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Reserve
BOOK NUMBER 1.9424
A8P94
1944

563880



COVER CROPS AND SEEDS

563880

Summary

Reserve

Legume and Grass Seed:

1. The seed production goals for legume and grass seed for 1944 are, in general, the same as for 1943.
2. There is an extreme shortage of northern alfalfa seed and the production in 1943 will probably be less than half of the need. The production of central and southern alfalfa seed will probably be sufficient to meet the need.
3. The 1943 production of red clover seed will be far below the established goal. The orchard grass seed crop, while only 8 percent smaller than the record 1942 crop, is short of the goal.
4. The situation regarding timothy is fairly satisfactory but the production of all other hay crop seeds is short of the goals. The production of Sudan grass seed is expected to be low because of the competition with grain sorghums for acreage.
5. The production of all cover crop seeds is inadequate to meet the 1944 goals except in the case of Austrian Winter peas and Willamette vetch. The supply of phosphate is a limiting factor in the use of cover crop seeds.
6. There is direct competition in the production of grass and legume seeds with the production of other crops, including hay and pasture. Additional acreages of rotation and plowable pasture lands are being put under cultivation which will further reduce the acreage available for seed production.
7. There is a shortage of seed harvesting machinery, labor for harvesting seed, and insecticides for the protection of seed crops. Insufficient seed processing machinery, seed testing facilities, and transportation interfere in the delivery of seed in time for proper seedings.
8. The financial returns from a number of seed crops are low in relation to those from other crops and adjustments are necessary to get increased production.
9. Extension of the plan for support prices is recommended, including the adjustment of some present support prices.
10. A departmental campaign for the production of more seed of legumes and grasses, with particular emphasis on improved varieties and strains, is recommended.

Vegetable Seeds:

1. The requirements for vegetable seeds for 1944 are slightly above 1943 for beans, wrinkled peas, sweet corn, tomatoes, garden beets, cauliflower, swiss chard, and kale. The requirements for all other vegetable seeds are approximately the same as in 1943.
2. It is expected that the acreage for production of vegetable seeds in 1944 can be secured as there is little competition with other crops. Most vegetable seeds are produced under contracts between farmers and dealer-growers.
3. The problems in connection with reaching the 1944 goals for vegetable seeds are insufficient labor and equipment, and a serious shortage of fungicides and insecticides. There is also a critical need for technical help.

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COVER CROPS AND SEEDS

Legume and Grass Seed:

Seed production of legumes and grasses is extremely important if yields per acre of row crops and grain crops are to be maintained. Crop rotations which include legumes and grasses result in a large increase in the total production of crops. The use of winter and summer cover crops has brought about similar increases in the acreage yields of row and grain crops. The use of legumes as a source of organic matter to increase crop production is highly important just now and is one of the most effective and reliable methods of getting increased production.

Legumes and grasses, through seedings for permanent pasture, in the crop rotation, and as winter and summer cover crops, are very important in helping meet the need in feed supplies for the tremendous population of livestock now carried in this country. Protein concentrates are far below greatly increased demands, and improved pastures are an excellent substitute, but more seed must be made available before large acreages can be established or improved. In addition, ample acreages of grasses and legumes are a source of reserve feed that can be utilized in case of drought or other unlooked-for emergency.

In order to maintain our soils and prevent wind and water erosion, it is essential that legumes and grasses be used in our cropping system. In addition, the rotation of crops is of primary importance in the control of many insects and diseases.

Legumes and grasses will aid production (1) by increasing acre yields of subsequent crops; (2) by furnishing a higher acre production with much less labor; (3) by relieving the shortage of nitrogen; and (4) by relieving the shortage of protein concentrate feeds. However, the quantity of seed of annual, biennial and perennial grasses and legumes that is available again becomes the limiting factor in increasing production by this route.

The production of grass and legume seed in 1943 failed to meet production goals, which constitute the requirements for domestic and export needs. Orchard grass seed production is only 70 percent of the goal; crimson clover, 78 percent; meadow fescue, 50 percent; white clover, about 90 percent; and vetch, about 60 percent; statistics on production of alfalfa, red clover, and many others are not yet available, but similar shortages of all grass and legume seed seems apparent except in the case of Austrian Winter peas where preliminary indications point to a production of 150 percent of the 1943 goals.

Failure to produce sufficient seed of legumes and grasses to meet the estimated needed production is due to several factors: (1) the emphasis that has been placed on increased acreage of other crops as single commodities has not left sufficient acreage for grasses and legumes; (2) there has been rather severe winter-killing of alfalfa and red clover and in some sections of the country unfavorable weather for seed production has resulted in lowered yields; (3) the lack of labor; (4) the brisk demand for hay; and (5) the uncertainty of seed prices have all tended to further reduce the acreage harvested for seed. Seed production is hazardous, and farmers generally are not willing to risk losing the profits assured by price supports of other crops and take the double risk of an uncertain seed crop with an unknown price.

Seed Requirements

The supply of hay crop seeds is inadequate to meet the needs of the food production program, and provide sufficient seed for export and carry-over. The goals recommended for 1944 are in general the same as for 1943.

The production of northern alfalfa seed (that produced north of the States of Utah, Colorado, Kansas, and eastward) was about 23 million pounds in 1942. The need of northern seed for domestic consumption, lend-lease, and some carry-over in 1944 is approximately 55 million pounds. On the other hand, the production of central and southern seed in 1942 was approximately 35 million pounds, which is the approximate need for domestic use, exports, and some carry-over. This includes an allowance of 8 million pounds of Central States seed for the more temperate sections of Illinois, Indiana, Ohio, and Pennsylvania. But, this adjustment does not materially relieve the extreme shortage of northern seed.

The situation regarding red clover seed is acute. The requirements for 1944 are approximately the same as for 1943, yet it is quite evident that the production in 1943 will be below the 1942 production and far below the established goal.

The 1943 orchard grass seed crop is only 8 percent smaller than the record 1942 crop, but is short of the goal. The need for domestic use and lend-lease exceeds supplies nearly one-fourth.

The demand for brome grass is expanding rapidly and although it is apparent that there will be considerably more brome harvested in 1943 than in 1942, the supply may be inadequate to meet the demand. Large quantities of brome grass seed can and undoubtedly will be used for mixed seedings with alfalfa to relieve the shortage of northern alfalfa seed.

The demand for regular meadow fescue seed comes mostly from lend-lease, with a brisk demand for seed of improved strains for domestic use. It is apparent that the need for meadow fescue seed is about twice the production. Supplies of timothy seed are a little larger than a year earlier despite the fact that the 1943 production, forecast at 63,068,000 pounds of thresher-run seed, is 17 percent smaller than last year's crop of 75,848,000 pounds. There is increased demand for the new, more productive strains.

A reserve of Sudan grass seed should be developed to meet emergencies. A great deal of difficulty was encountered in locating sufficient seed of Sudan grass to meet the demand following the droughts of 1934 and 1936.

Cover crop seeds will be insufficient to meet the demand except in the case of Austrian Winter peas and Williamette vetch. The need for seed of other vetches, crimson clover, bur clover, ryegrass, and other cover crops is approximately the same as 1943, although the use of the legumes depends on the availability of phosphate. It is possible to encourage increased plantings of winter legumes to get increased production of other crops but it is felt that it would be a mistake to expand the acreages unless ample supplies of phosphate are available to use with the seedings.

Production Capacity

The acreage of legumes and grasses is ample for needed seed production, although there is direct competition with the production of other crops. For example, in the case of northern alfalfa seed, the State reports indicate approximately 452,000 acres may be harvested for seed while the 1944 requirement is 800,000 acres, from a total of about 10 million acres of alfalfa in this area. In order to get larger seed supplies, it will be necessary to make seed production a better financial undertaking. In many cases livestock production is in direct competition with seed production. Farmers cannot be expected to leave a good crop of high-priced hay in order to obtain an uncertain seed crop unless it is a profitable undertaking. The red clover situation is quite similar to that of alfalfa.

The production of Sudan grass seed has been reduced largely because of direct competition with the grain sorghums for acreage. The campaign last spring for increased grain sorghum production re-

sulted in a decreased acreage of Sudan grass. Cover crop seeds are in general in the same category as most of the hay crop seeds.

If it is possible, through support prices and conservation payments, to make it fully as remunerative to a farmer to produce legume and grass seed as to produce soybeans, corn, hay, and other crops, it will not be so difficult to get the production.

Suggested Goals

In general, the recommended 1944 goals of hay and cover crop seeds are the same as for 1943. They have been set in line with domestic needs, estimates of quantities to be exported, and for stockpiling. The committee feels that the goals should be definitely maintained in line with the needs picture and should not be reduced merely because they were not reached in 1943. Large acreages will need reseeding in the post-war period and seed supplies cannot be replenished quickly if reserves get low.

Requirements for Labor, Machinery, Fertilizer, and Other Supplies

There is a shortage of machinery and labor for harvesting seed of hay and cover crop seeds, and production is lowered because of the shortage.

The use of winter legumes for obtaining increased production of needed war crops is definitely limited by available supplies of phosphate. It is also an established fact that nitrogen will materially increase the yield of grass seed per acre and more nitrogen will be needed for this purpose.

More insecticides are needed to protect cover crops in the field. Such infestations jeopardize other crops such as edible peas.

Processing, Storage, and Transportation Capacity

There is inadequate processing machinery to take care of grass and legume seed in some areas. The processing of dry beans and peas generally takes precedence and the grass and legume seed must wait. This causes a delay in transportation and frequently results in seedlings being made too late for good results. There is also a shortage of processing machinery in new seed production areas. Recognized seed testing facilities are inadequate, and materially delay seed movement.

There is a definite problem in connection with the transportation and storage of winter cover crop seeds produced in the Pacific Northwest and used in the Southern States. Attempts should be made to secure adequate storage facilities for winter cover crop seeds to be used in the Southern States, either where produced or at some intermediate points. Seed produced in the Pacific Northwest does not seem to store well in the humid areas. If adequate supplies are to be available, it appears necessary to keep a large quantity of seed in storage as it is impossible to move a large crop of Northwest seed to the South in time for planting the same season.

Commodity Returns

For a number of the grass and legume seed crops, the financial returns are lower than those of other crops. For example, in eastern Washington and northern Idaho the price support of 6.1 cents for dry peas is materially reducing the acreages of sweetclover, alfalfa, and forage grasses, and peas are expanding into the cut-over areas where substantial amounts of alsike and sweetclover seed are ordinarily produced. Throughout southern Idaho, potatoes and dry beans are being expanded at the expense of alfalfa, red clover, and alsike clover seed production. In the drier areas of the West, removing

of acreage limitation on wheat is resulting in a plow-up of crested wheat and similar grasses. It is estimated that 30,000 acres of crested wheatgrass will be plowed this year in the State of Washington. Soybeans, corn, and other crops have materially reduced the acreage of red clover, sweetclover, and alsike clover in the Corn Belt States.

Problems in Obtaining Suggested Goals

The main problems in meeting the suggested goals are as follows:

1. Competition of other crops with hay and cover crop seeds has resulted in a reduced acreage for seed production.
2. The prices of some seeds are low in comparison with prices that can be obtained for other crops.
3. Due to record numbers of livestock, relatively more land is being pastured or cut for hay instead of being left for seed production.
4. The uncertainty of seed production because of weather conditions is a very important reason why farmers prefer to harvest a hay crop.
5. Lack of experience on the part of farmers in methods of harvesting and handling seed, particularly in new areas of seed production, is a serious handicap.
6. With present inadequate labor, there is definite competition between seed harvesting and the production of other crops.
7. Equipment for harvesting seed in some areas is inadequate and materially affects the quantity of seed produced.

Recommendations for Goals Attainment

The present plan for support prices for seeds should be continued, but some changes are needed. Increased support prices will be necessary to get the needed production of northern alfalfa, sweetclover, red clover, alsike, orchard grass, hairy vetch, common vetch, and common rye-grass. Support prices should be established for additional grasses that do not now have support prices, including big bluestem, little bluestem, and switch grass (including improved strains of all three), and emergency forage crop seeds. It is recommended that the support price for Austrian Winter peas be adjusted to balance with competing crops in view of present production and carry-over. It is recommended that the practice of making payments to farmers for producing needed seeds be extended and ~~increasing~~ ^{increased} the rates of payments where necessary to get the desired production.

It is recommended that the Department of Agriculture reexamine the allocations of seed harvesting machinery, fertilizer, and insecticides in order to determine if the allocations provide for sufficient supplies, in light of seed production goals.

It is also recommended that a departmental campaign for the production of more seed of legumes and grasses, with particular emphasis on improved varieties and strains, be planned and carried out in an organized manner by all of the bureaus of the Department that can in any way assist in this program.

COVER CROPS AND SEEDS

Vegetable Seeds:

Seed Requirements

The requirements for vegetable seeds will increase slightly for some kinds but will remain practically the same for nearly all of the others. The increases will be due partly to military and lend-lease demands and partly to domestic requirements. It is expected that exports will remain practically the same. Carry-over stocks of several kinds have been very small and there is need to build up adequate supplies, as an insurance against possible short crops. It is also desirable to build up a stockpile of vegetable seeds to be used to rehabilitate occupied countries.

Production Capacity

The acreage available for vegetable seed production in this country is probably sufficient and, with one or two exceptions, there is little competition for land with other crops although there is some competition between various kinds of vegetable seeds. The most important limitation in vegetable seed production is the critical shortage of technical workers who have been taken by the military services or who have gone into other lines of work. The growing of vegetable seeds is mostly handled by contracts between farmers and dealer-growers. The dealer-growers have supplied the stock seed and much of the equipment and technical skill needed for growing, harvesting, and processing of the seeds. The capacity of dealer-growers to supply these services and equipment, due to shortage of skilled seedsmen, may be a limitation to production especially with those crops which require the close technical supervision with respect to isolation, roguing, protection, and harvesting. The shortage of ordinary farm labor may discourage many contracting farmers from accepting contracts for vegetable seed production, a high labor-consuming enterprise, and may make the attainment of goals difficult in some areas.

Suggested Goals

The goals for 1944 have been increased over 1943 for several kinds of seeds including beans, wrinkled peas, sweet corn, and tomato of the annuals and garden beets, cauliflower, swiss chard and kale of the biennials. These increases range from 8 percent to 37 percent. There have been a few slight decreases in the goals of a few kind of seeds of which either stocks and prospective production is ample or the needs will be supplied from other sources.

The critical items of which the greatest shortages exist are beets, cabbage and onion--biennial crops--requiring two years for seed production. The goals of these are placed high enough so that if attained, sufficient seed will be obtained to meet all requirements.

Requirements for Labor, Machinery, Fertilizer, and Other Supplies

The requirements for machinery, fertilizer, and other supplies will be about the same as for other years and it is expected that these can be obtained but with some difficulty. Fungicides and insecticides for the protection of the crops are critically short. Skilled and unskilled labor is critically short and these must be supplied if the goals are to be maintained.

Processing, Storage, and Transportation Capacity

The capacity for processing, storage, and transportation of vegetable seeds is nearly sufficient. Enough of these items to provide replacements to maintain present equipment and some additions will be necessary. However, labor shortages have in some cases prevented the full utilization of the present facilities.

Commodity Returns

The prices received for vegetable seeds are probably high enough for the attainment of goals.

Problems in Obtaining Goals

The labor shortage and the critical need for technical help are the most important problems to be solved before the goals can be attained.

Recommendations for Goal Attainment

Vegetable seed growers should be given every needed assistance in obtaining labor, equipment, and insecticides for their operations. Draft deferment for men skilled in vegetable seed production is necessary for the attainment of these goals.

Needed: Increased Seed Production of Improved Varieties
of Crops

One of the most opportune and readily available ways of increasing food and feed production on present acreages is the use of improved varieties and strains of crops in the areas where they are adapted. This applies particularly to improved varieties of soybeans, peanuts, potatoes, wheat, barley, oats, red clover, alfalfa, sorghums, and Sudan grass, as well as some other crops. Many of these improved varieties are resistant to diseases, insects, and other environmental hazards which, when present, reduce production and bring about wastes and inefficient use of labor, fertilizers, and land.

Corn hybrids have materially increased corn production, yields averaging from 10 to 20 bushels more per acre than the open-pollinated varieties formerly used; wheat, resistant to stem and leaf rust, has prevented serious losses; new varieties of disease-resistant oats have increased yields from 10 to 15 bushels per acre; hardy, wilt-resistant alfalfa varieties enable farmers to maintain productive stands two to three years longer than when common varieties are used; the use of improved varieties of red clover means increasing production from one-fourth to one ton of hay per acre; sweetclover varieties maturing three weeks later means three weeks of additional pasture; varieties of smooth brome grass adapted to central latitudes have materially increased the yields of pasture and hay in the Corn Belt; a disease-resistant variety of Sudan grass has made this crop profitable in the Southern States; new varieties of soybeans means increased production of oil and protein per acre; and superior varieties of vegetables have materially increased yields, reduced waste, and have led to an improvement in quality of food. Many more examples of the value of improved varieties of other crops could be added. The above examples clearly indicate the potentialities of increasing production by the use of superior varieties.

In some cases, seed stocks of the improved varieties are being completely utilized as rapidly as they are available. In other cases, however, improved varieties are not being utilized to the extent desirable, and there are many acres on which common inferior varieties are being grown, in part at least because seed of the best varieties is not available in required amounts. The increase of seed stocks of improved varieties and strains and their use in the state or region where adapted are two phases of the general problem of increased food and feed production which merit emphasis as an important part of the national program.

Seed supplies of superior varieties are being increased in over 38 states, principally through State Crop Improvement Associations and organized groups interested in specific crops working with the State Agricultural Experiment Stations and Extension Services. Notable advancement has been made but the natural inertia to be expected in any change of farm practice has held back the most complete utilization of these valuable seed supplies. Certified seed of superior varieties, the product of Federal and State research, represent the first essential step in increasing seed stocks under conditions which maintain and protect those characteristics that make the variety or strain superior in production. Such seed should be the foundation stocks from which farm seed supplies are derived. During the war emergency every effort should be made to increase the production of certified seed, and to see that this seed and its immediate increase are used on farms. In many instances seed increase fields of superior varieties do not quite meet the high standards and specifications necessary for certification, yet the seed from such fields is still much superior to the seed of common varieties that is frequently used. Where seed supplies of improved varieties are limited, the use on farms of such improved seed not quite meeting certification standards should be encouraged, replacing it with better supplies as these later become available. Crop Improvement Associations in some states maintain published lists of supplies of this type of seed, but all too frequently such seed is used for general plantings rather than for seed increase. During a period of insufficient seed supply, such seed can be used advantageously for seed production to build up seed supplies for larger acreages.

The value of improved varieties is recognized in several action programs of the CCC, AAA, and SCS and this recognition should be further stressed. Frequently, however, seed of improved varieties adapted to one or more states of a region is used in other states or regions where it is not adapted and this use should be discouraged through coordinated efforts of all concerned. Research results, and recommendations based on them, should be the basis of every program to increase production through encouragement in the use of improved strains. It is recommended, therefore, that action be taken by every possible means to increase the seed supplies of superior varieties to whatever extent and degree of refinement necessary and to see that such seed is used in the specific area where adapted. This may be accomplished in part by:

- (1) Establishing state zones of varietal and strain adaptation, listing for each zone those superior varieties which are adapted.
- (2) Determining the total quantities of seed of improved varieties available for seeding purposes, and the amounts of seed in different quality classes and the extent to which supplies in the different quality classes shall be used for further seed production.
- (3) Determining the seed needs of the acreage for the different crops necessary to meet production goals.
- (4) Using seed of improved varieties that just fails to meet certification standards for the production of commercial seed rather than for general plantings.
- (5) Encouraging the production of certified seed by adequate support prices, and directing such seed into seed production wherever shortages exist in certified seed supplies of improved varieties.
- (6) Locating surplus seed of improved varieties available in one section and assisting in making such seed available for use in other sections where adapted.
- (7) Developing special programs for a more rapid increase of urgently needed seed of improved varieties where small quantities now exist.

Examples of what can be done under each of the above points are available.

A coordinated effort by state and federal research, action, and extension agencies in cooperation with the seed trade and crop organizations can accomplish these objectives. It is suggested that such a program be made an integral part of the national food and feed production effort, and that the necessary steps be taken to implement this recommendation.

ESTIMATED REQUIREMENTS FOR SEEDS PRODUCED IN 1944
(1,000 Pounds of Seed)

Crop	Domestic Requirements for Seed Produced in				Export and		Stocks Situation			Change in		Imports		Net Total		1944	
	: 1937-41 : 1942 : 2 : 3				: Military : Requirement :		: Beginning : of Year : Year :			: Stocks :		: (Col. 3+4+7-8)		: Farm : Weight :		: Production : Goal :	
	1	2	3	4	5	6	7	8	9	10	11						
Winter Cover Crop Seeds:																	
Hairy Vetch	18,880	33,848	30,500	500	2,000	7,255	5,255		36,255	36,255	36,255				36,255	36,255	
Common Vetch	8,700	14,000	10,000	3,900	1,500	3,700	2,200		16,100	16,100	16,100				16,100	16,100	
Willamette Vetch	3,200	4,000	4,000		13,600	9,600	4,000										
Purple Vetch	2,235	9,740	7,000		6,190	7,940	1,850		9,850	9,850	9,850				9,850	9,850	
Austrian Winter Peas	32,450	75,097	98,000		120,000	80,000	37,900	38,000	60,000	60,000	60,000				60,000	60,000	
Crimson Clover	7,552	19,644	16,060	100	4,500	7,260	2,760		18,920	18,920	18,920				18,920	18,920	
Ryegrass, Common	21,471	33,665	21,800	11,000	8,000	9,200	1,200		34,000	34,000	34,000				34,000	34,000	
31,500																	
Hay Crop Seeds:																	
Legumes																	
Alfalfa 1/	65,401	56,695	76,000	6,000	3,300	13,300	10,000	3,000	89,000	110,000	108,910				110,000	108,910	
Red Clover 1/	75,411	68,792	78,000	14,000	12,000	18,000	6,000		98,000	120,000	117,807				120,000	117,807	
Alsike Clover 1/	15,920	12,206	16,000	3,000	2,400	6,000	3,600		22,600	28,000	27,704				28,000	27,704	
Sweet Clover 1/	54,073	40,669	55,000		7,000	11,000	4,000	2,000	55,000	72,000	70,748				72,000	70,748	
White Clover	1,846	1,623	1,600	600	500	500			2,200	2,200	2,200				2,200	2,200	
Ladino Clover	360	800	1,350		50	200	150		1,500	1,500	1,500				1,500	1,500	
Lespedeza 1/	118,405	153,191	160,000	1,000	7,000	14,000	7,000		168,000	200,000	197,783				200,000	197,783	
Grasses																	
Timothy 1/	58,107	45,842	60,000	9,000	36,000	22,000	14,000		55,000	60,000	57,936				60,000	57,936	
Bluegrass	19,919	22,067	22,000	2,000	10,500	10,500			24,000	48,000	48,000			2/	48,000	48,000	
Orchard Grass	2,678	1,064	3,000	6,600	350	450	100		9,700	9,700	9,700				9,700	9,700	
Meadow Fescue	678	369	400	2,000	150	250	100		2,500	2,500	2,500				2,500	2,500	
Brome Grass	4,377	8,991	10,000	1,300	4,500	4,500		4,000	7,300	7,300	7,300				7,300	7,300	
Sudan Grass	62,232	44,552	60,000	200	10,000	15,000	5,000		65,200	71,000	71,000				71,000	71,000	

1/ Farm Stocks Included
2/ Rough Cured.

1944 SEED GOAL DATA

Commodity	Acreage (Thousands)						Percent 1944 Acreage						Production (Thousand Pounds)						Average Yield					
	:						:						:						:					
	Average: :1937-41:	1942	1943	1944	Goal	Indicated:	Prod.:	Goal	1944	1942	1943	1944	Goal is of	Average	1942	1943	1944	Indicated:	Goal	Average:	1942:	Assumed		
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18							
Winter Cover Crops:																								
Hairy Vetch	66.3	138.4	196.0	94.11/	142.5	103	152	15,868	33,700	45,800	24,8901/	36,250	247	243	254									
Common Vetch	22.9	43.1	75.02/	35.3	39.5	92	112	8,737	14,210	30,0002/	12,100	16,100	426	330	407									
Willamette Vetch	8.93/	22.0	22.0	17.0				3,1503/	9,900		7,600	8,345	4223/	450	430									
Purple Vetch	6.5	21.5	22.0	19.4	23.6	110	122	2,235	9,740	8,700	6,590	8,850	429	453	4203.55									
Aus. Winter Peas	44.5	137.4	119.0	154.4	69.3	50	45	32,450	135,100	89,500	136,000	60,000	761	983	866									
Crimson Clover	20.7	57.7	66.5	54.3	82.0	142	151	5,069	17,980	18,000	14,100	18,920	261	312	231									
Ryegrass, Common	(50.6)	(84.0)	75.0	62.0	89.3	106	144	(21,471)	(30,000)	30,000		31,500		353										
Hay Crops:																								
Alfalfa	827.6	624.5	891.0		1,123.0			76,306	58,470	100,000	(58,000)	108,910	93	94	97									
Red Clover	1,351.6	1,148.8	1,810.0		1,796.0	156		97,950	64,914	120,000	(55,000)	117,507	73	56	65									
Alsike Clover	147.5	87.1	195.0		217.0	249		15,566	15,342	25,000	(13,500)	27,704	136	176	128									
Sweet Clover	416.3	248.8	392.0		420.0	169		64,188	42,270	69,900	(45,000)	70,748	160	175	168									
White Clover	10.0	21.5	19.4		24.0	105		685	1,395	1,750	(1,500)	2,200	54	85	90									
Ladino Clover	(4.0)	(3.0)	17.6		17.6			514	5004/	1,500		1,500		85										
Lespedeza	704.5	847.6	950.0		1,000.0	118		144,926.7	179,700	200,000	(179,000)	197,783	201	212	198									
Timothy	459.5	435.4	471.0		394.0	90		71,230.5	73,057.5	70,000	(57,000)	57,936	152	168	147									
Bluegrass 6/								42,168	63,350	48,000	28,350	48,000	184	178	153									
Orchard Grass	30.3	48.2	73.0		73.0	150	160	4,231	6,090	8,230	5,726	9,700												
Meadow Fescue								645	1,150	2,000	1,050	2,500												
Brome Grass								1,476	6,0005/	12,000		9,000												
Sudan Grass	179.1	103.3			190.0			67,644	39,240			71,000	374	380	375									

1/ Oregon, Washington, Michigan and Arkansas.

2/ Includes Wilamette Vetch

3/2-year average.

4/ Rough estimates - not based on surveys. () Estimates by Goal Committee

5/ Estimates by 1942 goals committee.

6/ Rough cured seed.

Table 2

34,000,000

Requirements	32,800,000
Goal Production	31,500,000

REQUIREMENTS AND PRODUCTION
COMMODITY Ryegrass, Common

: PRODUCTION (Thousand Lbs.) : Assumed: 1 9 4 4 G O A L								
State	:	:	1943	1943	Av. Yield:	1944	Production :	
	: 1937-41	: 1942	: Goal	: Indicated:	1937-41	: Yield :	(Thou. Lbs.):	Acres
1	2	3	4	5	6	7	8	9
Kentucky	3/	3/	3,000	3/	3/	400	3,000	7,500
Oregon	21,471	30,000 ^{1/}	26,000	20,600 ^{2/}	354	350	26,000	74,285-300
Tenn.	3/	3/	1,000	3/	3/	400	1,000	2,500
Other St. ^{4/}	3/	3/	---	3/	3/	300	1,500	5,000
U. S.	---	---	30,000	---	---	353	31,500	89,285-300

^{1/} Includes 3,120,000 lbs. screened from other crops. ^{2/} Includes an estimated 2,000,000 pounds to be screened from other crops. ^{3/} No data. ^{4/} Ala., Ark., Okla.

Table 3 SUGGESTED 1944 ACREAGE OR NUMBERS WITH COMPARISONS
Commodity Ryegrass, Common

: Acres : Percent 1944 Goal is of:									
State	: Average	: 1942	: 1943	: 1943	: 1944	: 1944	: 1944	:	:
	: 1937-41	:	: Goal	: Ind.	: Prod.	: Goal	: Prod.:	1942	1943
	:	:	:	:	: Cap.	:	: Cap. :	:	: Indicated
1	2	3	4	5	6	7	8	9	10
Kentucky	3/	3/	7,500	3/	7,500	---	---	---	---
Oregon	50,600	84,000	65,000	62,000	108,000	74,285	88.4	119.8	
Tenn.	3/	3/	2,500	3/	2,500	---	---	---	---
Other St. ^{4/}	3/	3/	---	3/	5,000	---	---	---	---
U. S.	50,600	84,000	75,000	62,000	89,285	106.3	144.0		

^{3/} No data. ^{4/} Alabama, Arkansas, Oklahoma.

Table 2

36,255,000

Requirements	31,000,000
Goal Production	36,250,000

REQUIREMENTS AND PRODUCTION
Commodity Hairy vetch

: PRODUCTION (Thousand Lbs.) : Assumed: 1 9 4 4 G O A L								
State	:	:	1943	1943	Av. Yield:	1944	Production :	
	: 1937-41	: 1942	: Goal	: Ind.	: 1937-41	: Yield :	(Thou. Lbs.):	Acres
1	2	3	4	5	6	7	8	9
Ark.	1,217 ^{1/}	1,200	2,300	2,900	275 ^{1/}	275	3,000	10,900
Mich.	448	900	600	790	221	250	1,000	4,000
Oregon	14,240	30,000	32,000	20,000	249	250	30,000	120,000
Wash.	900 ^{1/}	1,600	4,600	1,200	267 ^{1/}	300	2,000	6,600
Other St. ^{2/}	---	---	6,300	---	---	250	2,550	1,000
U. S.	15,868	33,700	45,800	24,890	247	254	36,250	142,529.00

^{1/} 3-year average. ^{2/} Includes Calif., Ga., Miss., N. Car.

Table 3 SUGGESTED 1944 ACREAGE OR NUMBERS WITH COMPARISONS
Commodity Hairy Vetch

: Acres : Percent 1944 Goal is of:									
State	: Average	: 1942	: 1943	: 1943	: 1944	: 1944	: 1944	:	: 1943
	: 1937-41	:	: Goal	: Ind.	: Prod.	: Goal	: Prod.:	1942	Indicated
	:	:	:	:	: Cap.	:	: Capacity:	:	:
1	2	3	4	5	6	7	8	9	10
Ark.	4,333 ^{1/}	7,000	15,000	9,000	10,900	---	155.8	121.2	
Mich.	2,020	2,400	3,000	2,100	4,000	---	166.7	190.5	
Oregon	59,680	125,000	125,000	80,000	120,000	---	96.0	150.0	
Wash.	3,333 ^{1/}	4,000	18,000	3,000	6,600	---	165.0	220.0	
Other St. ^{2/}	---	---	35,000	---	1,000	---	---	---	---
U. S.	66,300	138,400	161,000	94,100	142,529.00	---	103.0	151.5	

^{1/} 3-yr. average. ^{2/} Includes Calif., Ga., Miss., N. Car.

196,000

Requirements 60,000,000
Goal Production 97,500,000

Commodity Austrian Winter Peas

Table 3 SUGGESTED 1944 ACREAGE OR NUMBERS WITH COMPARISONS

Commodity Austrian Winter Peas

Requirements 16,100,000
Goal Production 16,100,000

Commodity Common Vetch

Table 3 SUGGESTED 1944 ACREAGE OR NUMBERS WITH COMPARISONS

Commodity Common Vetch

Percent 1944 Goal is of:									
State	Average		1943		1944		1944		1943
	1937-41	1942	Goal	Indicated	Prod.	Goal	Prod.	1942		Indicated
					Cap.		Cap.		
1	2	3	4	5	6	7	8	9	10
Calif.	---	---	---	---		1,000	---	---	
Oregon	19,920	36,000	67,000 ^{3/}	30,000		30,500	71.7	101.7	
Wash. ^{2/}	5,000	7,100	8,000 ^{3/}	5,300		6,000	84.5	113.2	
Other St. ^{4/}	---	---	---	---		2,000	---	---	
U. S.	22,920	43,100	75,000 ^{3/}	35,300		39,500	---	---	
2/ Includes Willamette vetch. 3/ Common & Willamette vetch. 4/ Ala. Miss., La.									

Table 2

Requirements	16,160,000
Goal Production	18,920,000

REQUIREMENTS AND PRODUCTION

Commodity Crimson Clover

State	: PRODUCTION (Thousand Lbs.) :					: Assumed: 1944 GOAL :			
	: 1937-41	: 1942	: Goal	: Indicated	: 1937-41	: Yield	: (Thou.Lbs.	: Acres	
1	2	3	4	5	6	7	8	9	
Kentucky	423 ^{2/}	1,600	1,600	1,200	198.0 ^{2/}	200	1,000	5,000	
Oregon	619	3,300	3,900	900	369.0 ^{1/}	250	5,000	20,000	
Tenn.	3,400	10,600	7,800	8,900	230.0 ^{1/}	240	7,920	33,000	
Wash.	<u>4/</u>	<u>4/</u>	---	<u>4/</u>	<u>4/</u>	240	1,200	5,000	
Other St. (Ga.,Ala.,N.C.)	1,327 ^{2/}	2,480	4,700 ^{3/}	3,100	197.0 ^{2/}	200	3,800	19,000	
U. S.	5,069	17,980	18,000	14,100	261.0	231	18,920	82,000	
1/ 4-yr. ave. 2/ 3-yr. ave. 3/ Also includes Va., Miss., S.C., Ark. 4/ No data.									

Table 3 SUGGESTED 1944 ACREAGE OR NUMBERS WITH COMPARISONS
COMMODITY Crimson Clover

	Acres						Percent 1944 Goal is of:			
State	Average	1942	1943	1943	Prod.	1944	Prod.	1942	1943	
	1937-41		Goal	Ind.	Cap.	Goal	Cap.		Indicated	
1	2	3	4	5	6	7	8	9	10	
Kentucky	2,100 ^{2/}	4,900	6,000	4,900	6,000	5,000	83.3	102.0	102.0	
Oregon	1,886	13,000	13,000	4,000	8,000	20,000	250.0	153.8	500.0	
Tenn.	16,925 ^{1/}	29,000	30,000	33,000	33,000	33,000	100.0	113.8	100.0	
Wash.	4 [/]	4 [/]	---	4 [/]	---	5,000	---	---	---	
Other St. (Ga.,Ala.,N.C.)										
	6,732 ^{2/}	10,000	17,500 ^{3/}	12,400	7,000	19,000	---	175.9	153.2	
U. S.	20,726	57,700	66,500	54,300	---	82,000	---	142.0	144 151.0	
1/ 4-yr. av., 2/ 3-yr. av. 3/ Also includes Va.,Miss.,S.C., Ark. 4/ No data.										

Table 2

Requirements	<u>7,000,000</u>
Goal Production	<u>9,850,000</u>
	8,365,000

REQUIREMENTS AND PRODUCTION
Commodity Purple Vetch

State	PRODUCTION (Thousand:Lbs.)					Assumed:	1944	GOAL
	1937-41	1942	1943	1943	Av.Yield:	1944	Production:	
			Goal	Indicated:	1937-41	Yield	(Thou.Lbs.:	Acres
1	2	3	4	5	6	7	8	9
Calif.	3,750 ^{1/}	8,500	6,700	6,000	325 ^{1/}	350	7,000	20,000
Oregon	713	1,100	1,600	480	442	400	1,200	3,000
Wash.	110 ^{2/}	140	400	110	275 ^{2/}	275	1,650	600
U. S.	2,235	9,740	8,700	6,590	429	255	9,850	23,600
^{1/} 2-year average.		^{2/} 1941 only.					8365	

Table 3 SUGGESTED 1944 ACREAGE OR NUMBERS WITH COMPARISONS

COMMODITY	Purple Vetch
1. Alfalfa	100
2. Clover	100
3. Lucerne	100
4. Medick	100
5. Red Clover	100
6. White Clover	100
7. Yellow Clover	100
8. Blue Clover	100
9. Black Clover	100
10. Purple Vetch	100
11. Red Vetch	100
12. White Vetch	100
13. Yellow Vetch	100
14. Blue Vetch	100
15. Black Vetch	100
16. Purple Vetch	100
17. Red Vetch	100
18. White Vetch	100
19. Yellow Vetch	100
20. Blue Vetch	100
21. Black Vetch	100
22. Purple Vetch	100
23. Red Vetch	100
24. White Vetch	100
25. Yellow Vetch	100
26. Blue Vetch	100
27. Black Vetch	100
28. Purple Vetch	100
29. Red Vetch	100
30. White Vetch	100
31. Yellow Vetch	100
32. Blue Vetch	100
33. Black Vetch	100
34. Purple Vetch	100
35. Red Vetch	100
36. White Vetch	100
37. Yellow Vetch	100
38. Blue Vetch	100
39. Black Vetch	100
40. Purple Vetch	100
41. Red Vetch	100
42. White Vetch	100
43. Yellow Vetch	100
44. Blue Vetch	100
45. Black Vetch	100
46. Purple Vetch	100
47. Red Vetch	100
48. White Vetch	100
49. Yellow Vetch	100
50. Blue Vetch	100
51. Black Vetch	100
52. Purple Vetch	100
53. Red Vetch	100
54. White Vetch	100
55. Yellow Vetch	100
56. Blue Vetch	100
57. Black Vetch	100
58. Purple Vetch	100
59. Red Vetch	100
60. White Vetch	100
61. Yellow Vetch	100
62. Blue Vetch	100
63. Black Vetch	100
64. Purple Vetch	100
65. Red Vetch	100
66. White Vetch	100
67. Yellow Vetch	100
68. Blue Vetch	100
69. Black Vetch	100
70. Purple Vetch	100
71. Red Vetch	100
72. White Vetch	100
73. Yellow Vetch	100
74. Blue Vetch	100
75. Black Vetch	100
76. Purple Vetch	100
77. Red Vetch	100
78. White Vetch	100
79. Yellow Vetch	100
80. Blue Vetch	100
81. Black Vetch	100
82. Purple Vetch	100
83. Red Vetch	100
84. White Vetch	100
85. Yellow Vetch	100
86. Blue Vetch	100
87. Black Vetch	100
88. Purple Vetch	100
89. Red Vetch	100
90. White Vetch	100
91. Yellow Vetch	100
92. Blue Vetch	100
93. Black Vetch	100
94. Purple Vetch	100
95. Red Vetch	100
96. White Vetch	100
97. Yellow Vetch	100
98. Blue Vetch	100
99. Black Vetch	100
100. Purple Vetch	100

State	Average : 1937-41 :	1942 :	Acres 1943 : Goal :	1943 : Ind. :	1944 : Prod. :	1944 : Goal :	Percent 1944 Prod. :	Goal of : 1942 :	1943 Indicated
1	2	3	4	5	6	7	8	9	10
Calif.	11,500 ^{1/}	17,000	17,000	17,000		20,000		117.6	117.6
Oregon	1,870 ^{2/}	4,000	4,000	2,000		3,000		75.0	150.0
Wash.	400 ^{2/}	500	1,000	400		600		120.0	150.0
U. S.	6,550	21,500	22,000	19,400		23,600		109.7	121.6
^{1/} 2-year average. ^{2/} 1941 only.									

ALFALFA 1944 SEED GOAT DATA

[illegible]

RED CLOVER 19/4 SEED GOAL DATA

State and Commodity	Acreage (Thousands)										Production (Thousand Pounds)										Average Yield	
	1942	1943	1944	1945	1946	1947	1948	1949	1950	1951	1952	1953	1954	1955	1956	1957	1958	1959	1960			
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18					
Red Clover																						
New York	8.1	9.6	6	10	10	10	100	104	100	552	576	500	660	660	66	60	66					
Pennsylvania	29.2	13.0	8	31	31	31	100	238	100	1,680	858	500	1,804	1,860	58	66	60					
N. E. Div.		22.6	14	41	41	41	100	181	100	2,232	1,434	1,000	2,464	2,520								
Ohio	210.2	169.0	350	220	240	330	138	195	150	11,448	8,640	21,000	12,276	19,800	56	51	60					
Indiana	238.0	134.0	350	133	250	330	132	246	248	12,612	5,640	21,000	7,661	18,480	57	42	56					
Illinois	237.6	209.0	267			265		127		13,644	8,760	16,000		14,575	57	42	55					
Michigan	121.2	77.0	225		109	155-205	168-140	266-200		7,692	4,380	13,500		96,012,710	63	57	62					
Wisconsin	107.8	120.0	111	160	155	160-110	103	92-133		7,008	6,480	8,000		10,560	66	54	66					
Minnesota	39.1	56.0	65			65		116		2,964	3,360	5,500		5,460	79	60	84					
Iowa	139.1	185.0	190	180	192	192	100	104	107	7,392	8,880	9,500	9,288	10,368	51	48	54					
Missouri	83.2	90.0	105	90	90	105	117	117	117	5,682	5,940	6,300	5,472	6,300	68	66	60					
Nebraska			6	4	4	6	150	155	150			500		360			60					
N. C. Div.	1,040.0	1,669				1,608				68,442	52,080	101,300		95,313								
Maryland	30.6	14.0	18	20	25	25	100	179	125	1,692	672	1,500	1,116	1,500	56	48	60					
Virginia	16.0	5.0	3	15	20	20	100	400	133	1,128	240	200	1,080	1,320	72	48	66					
Kentucky	20.2	18.2	17		20	20	100	110		1,776	1,800	1,500		1,920	87	99	96					
E. C. Div.		37.2	38		65	65	100	175		4,596	2,712	3,200		4,740								
Kansas	6.0	16.8	12		16	16	100	95		312	1,008	500		864	53	60	54					
Idaho	41.2	18.2	29			29		159		10,860	5,040	8,000		7,830	273	276	270					
Washington	4.3	2.0	4	2	2	4	200	200	200	8,220	420	1,000	380	840	190	210	210					
Oregon	18.9	12.0	22		18	25	139	208		3,288	2,220	3,000		4,200	174	186	168					
West Div.		49.0	67			74		151		22,680	8,688	12,500		13,734								
Other States 1/			22	8	8	8						2,000		1,000								
U. S.	1,351.6	1,148.8	1,810			1,796		156		97,950	64,914	120,000		117,807	72.6	56.4	65					
1/ Montana, Colorado, South Dakota, North Carolina, Tennessee, West Virginia, Delaware, New Jersey.																						
8/14/43																						

ALBERT CLOVER 1944 SEED GOLF DATA

State and Division	Acreage (Thousands)										% 1944 Acreage Goal is of:										Production (Thousand lbs)										Average Yield			
	1942		1943		1944		Prod.		1944		Prod.		1942		1943		Average		1942		1943		1944		Average		1942		Assumed					
	Average: 1937-41	Goal	Indicated	Capacity	Goal	Capacity	Goal	Capacity	Goal	Capacity	Indicated	1937-41	Indicated	1937-41	Indicated	1937-41	Average	1942	Goal	Indicated	Goal	Indicated	Goal	Average	1937-41	1942	Goal	1944	1944					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18																	
New York	1.2		1.0	2.0	2.0	2.0	2	100	200	100	108	108	200	175	192	88	108	96																
N. E. Div.	1.2		1.0	2.0	2.0	2.0	2	100	200	100	108	108	200	175	192	88	108	96																
Ohio	37.6	14.1	52.0	18.0	18.0	50	278	355	278	3,024	1,740	5,000	153	4,500	85	123	90																	
Indiana	9.6	3.0	12.0		3.0	14	467 280	467	467	696	198	1,000	216	1,106	72	66	79																	
Illinois	18.0	8.0	22.0			24		333		1,542	960	2,000		2,112	83	120	88																	
Michigan	11.6	5.0	23.0			29		580		1,338	600	2,400		3,306	116	120	114																	
Wisconsin	13.3	4.0	15.0			21		525		1,758	600	2,000		2,698	130	150	138																	
Minnesota	22.8	22.0	29.0			34		155		2,928	3,180	4,300		4,488	128	144	132																	
Iowa	5.2	5.4	7.0	5.0	8.0	8	100	148	160	456	354	600	426	672	85	66	84																	
Missouri	2.0	1.4	4.0	5.5	5.5	6	109	429	109	144	102	300	378	450	76	72	75																	
N. C. Div.	120.1	62.9	164.0			186		296		11,886	7,734	17,600		19,532																				
Idaho	5.2	5.2	4.0			4		77		1,548	1,560	1,200		1,080	300	300	270																	
Oregon	21.0	18.0	25.0			25	147	139		6,024	5,940	6,000		6,900	290	330	276																	
West Div.	26.2	23.2	29.0			29		125		7,572	7,500	7,200		7,980																				
U. S.	147.5	87.1	195.0			217		249		19,566	15,342	25,000		27,704	136	176	128																	

8/16/43

SWEET CLOVER 1944 SEED GOAL DATA

State and Commodity	Acreage (Thousands)										Production (Thousand Pounds)										Average Yield			
	: : : : : : : : : : : :										: : : : : : : : : : : :										: : : : :			
	: 1942 : 1943 : 1944. : : : : : : : : : : :										: 1943 : 1942 : 1943 : 1944 : 1943 : 1944 : 194													

1/ New York, Kentucky, Oklahoma and Washington

8/16/43

L'ESPANZA 1944 SEED GOLD DATA

State and Division	Average (Thousands)										Production (Thousand Pounds)										Average Yield			
	1937-41		1942		1943		1944		1945		1946		1947		1948		1949		1950		1951		1952	
	Average	Goal	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity	Prod.	Capacity
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18							
Indiana	22.8		25.0	33.0	30	26	30	115	120	100	4,747	4,800	5,000	6,060	6,000	202	190	200						
Illinois	25.8		12.0	17.0		17			142		4,850	1,800	3,000		3,077	182	150	181						
Missouri	174.4		100.0	289.0	200	409	266	65	148	133	35,134	29,700	65,000	39,200	46,550	196	165	175						
N. C. Div.			217.0	339.0			313		144		44,731	36,300	73,000		55,627									
Virginia	28.6		34.0	36.0	35	35	35	100	103	100	6,373	9,200	10,000	7,805	8,050	223	270	230						
North Carolina	139.0		185.0	170.0	158	181	180	99	97	114	25,612	38,800	34,000	29,230	45,000	185	210	250						
Kentucky	92.6		92.0	120.0		92	95	103	103		20,563	24,400	21,000		16,055	208	265	169						
Tennessee	136.4		122.0	125.0		126	125	99	102		30,787	30,500	25,000		29,125	220	250	233						
E. C. Div.			433.0	451.0			435		100		83,335	102,900	90,000		96,230									
South Carolina	24.0		42.0	60.0	63	65	65	100	155	103	4,132	9,000	12,000	10,773	12,025	171	215	185						
Georgia	16.0		40.0	22.0		44	40	91	100		2,851	8,400	5,000		6,600	166	210	165						
Alabama	10.0		16.0	20.0			25		156		1,880	3,200	4,000		4,750	190	200	190						
Mississippi	9.1		18.0	18.0			20		111		1,254	3,300	2,000		2,800	131	185	140						
Arkansas	9.7		22.0	30.0		57	45	79	204		1,939	6,000	6,000		9,000	190	275	200						
Louisiana	5.6		11.6	7.0		27	27	100	233		.7	1,500	1,000		3,051	113	130	113						
South. Div.			149.6	157.0			222		148		12,056.7	31,400	30,000		38,226									
Kansas	25.8		48.0	3.0		48	30	62	62		4,804	9,100	7,000		5,700	165	190	190						
West. Div.			48.0	3.0					62		4,804	9,100	7,000		5,700									
U. S.	704.5		847.6	950.0			1,000		118		144,926.7	179,700	200,000		197,783	200.7	212	198						

TIMOTHY 1944 SEED GOAL DATA

State and Division	Acreage (Thousands)										Production (Thousand Pounds)										Average Yield	
	: 1942 :					: 1943 :					: 1944 :					: 1945 :					: Average :	
	: Average :	: 1937-41 :	: Goal :	: Indicated :	: Capacity :	: Prod. :	: 1944 :	: Prod. :	: Goal :	: Indicated :	: Capacity :	: Prod. :	: 1943 :	: 1942 :	: 1941 :	: 1940 :	: 1939 :	: 1938 :	: 1937 :	: 1936 :		
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18					
Pennsylvania	5.4	5.6	5.0	6.0	6.0	5	83	89	83	657	742.5	700	734	630	122	133	126					
N. E. Div.	5.4	5.6	5.0			5	83	89	83	657	742.5	700	734	630								
Ohio	51.4	53.0	45.0	43.0	41.0	40	98	75	93	8,289	8,010.0	6,500	6,717	5,800	156	201	145					
Indiana	13.0	13.8	13.0	10.0	12.0	10	83	72	100	1,962	1,845.0	2,600	1,485	1,450	148	135	145					
Illinois	53.0	34.0	54.0			45		132		6,471	4,275.0	6,300		5,400	122	126	120					
Wisconsin	12.3	20.0	16.0			12		60		1,818	3,600.0	2,200		1,836	148	180	153					
Minnesota	27.5	39.0	24.0			20		51		4,563	7,200.0	3,700		3,320	162	184	166					
Iowa	216.6	210.0	232.0	200.0	200.0	200	100	95	100	35,491.5	38,745.0	37,500	31,860	31,400	159	184	157					
Missouri	80.2	60.0	70.0	50.0	80.0	60	75	100	120	11,979	8,640.0	9,500	7,155	8,100	143	144	135					
N. C. Div.		429.8	459.0			387		90		70,573.5	72,315.0	68,300		57,306								
Other States 1/			7.0		2.0	2	100					1,000										
U. S.	459.5	435.4	471.0			394		90		71,230.5	73,057.5	70,000	57,000	57,936	152	168	147					

8/16/43

VEGETABLE SEEDS

Table I - Estimated requirements from crops of 1944
(In thousand pounds)

Commodity	Domestic require- ments	Military and foreign require- ments	Total	Desired increase in stocks	Imports	Require- ments from U.S. production
	1	2	3	4	5	6
Beans	64,007	3,200	67,207		31	67,176
Beet, garden	1,500	1,711	3,212	460		3,672
Beet, mangels	100	758	858	50		908
Broccoli	40	1	41			41
Brussel sprouts	4	1	5			5
Cabbage	500	220	720		4	716
Cabbage, Chinese	14	-	14			14
Carrots	835	1,566	2,401			2,401
Cauliflower	9	57	66			66
Celery	42	5	47			47
Chard, Swiss	105	122	227			227
Chicory	10	13	23			23
Collard	-	1	1			1
Corn, sweet	14,503	714	15,217	750	1	15,566
Corn, non-sweet	-	-	-			-
Cress	-	1	1			1
Cucumber	750	171	921			921
Dill	-	-	-			-
Eggplant	4	5	9			9
Endive	100	26	126			126
Kale	60	2	62			62
Kohlrabi	8	3	11			11
Leek	-	79	79	6		85
Lettuce	800	455	1,255			1,255
Muskmelon	300	9	309			309
Watermelon	585	14	599			599
Okra	-	2	2			2
Mustard	392	6	398			398
Onion seed	500	1,101	1,601		169	1,432
Parsley	148	25	173			173
Parsnips	60	115	175		1	174
Peas	185,006	5,593	190,599		274	190,725
Pepper	25	19	44			44
Pumpkin	40	5	45			45
Radish	1,425	436	1,861		1	1,860
Salsify	-	5	5			5
Spinach	1,500	429	2,329			2,329
Squash	342	86	428			428
Tomato	360	73	433	48		481
Turnips	1,850	242	2,092		5	2,087
Rutabaga	17	543	560		2	558
Miscellaneous	7	557	564			564
Total	276,349	18,771	295,120	1,314	488	295,946

Food Distribution Administration
Requirements and Allocations Control
August 16, 1943

Requirements and Production
(In thousand pounds)

Vegetable Seeds

Table 2

COMMODITY	Require- ments	:	Production				Ave.: Yield:		1944 Goal	
			Average:	1942	1943	1943	1939-42	Prod.	Acres	
			1939-42:	Goal	Est.	42	1,000 lb.:			
Beans, dwarf gr.			26,966	39,862	32,000	53,355	801	45,000	56,000	
Beans, wax gr.			3,807	4,656	5,000	7,290	592	6,000	10,000	
Beans, pole (67,176) ^{3/}			5,253	6,763	6,000	10,357	984	8,000	8,000	
Beans, lima			2/							
Beets, garden	3,672		1,526	2,170	3,000	2,388	583	3,500	6,000	
Beets, mangels	908		90	202	2,000	837	637	1,000	2,000	
Broccoli	41		2/							
Brussel sprouts	5		2/							
Cabbage, Chinese	14		2/							
Cabbage, garden	716		469	605	1,200	235	477	1,400	3,000	
Carrots	2,401		1,288	2,216	3,000	4,038	330	3,000	9,000	
Cauliflower	66		28 ^{1/}	52	60	82	424	65	153	
Celery	47		2/							
Chard	227		166	382	200	304	815	225	278	
Chicory	23		2/							
Corn, sw.hybrids			4,928	6,281	7,500	10,930	1,105	10,000	9,000	
Corn, sw. var. (15,966) ^{3/}			5,023	5,807	5,500	8,262	1,204	6,000	5,000	
Cucumber	921		523	723	1,200	1,587	189	1,200	6,000	
Eggplant	9		2/							
Endive	126		2/							
Kale	62		36 ^{1/}	46	90	151	336	90	268	
Kohlrabi	11		2/							
Leek	85		11 ^{1/}	22	60	66	264	75	284	
Lettuce, heading			676	555	1,200	815	259	1,200	4,600	
Lettuce, leaf (1,255) ^{3/}			280	213	400	704	422	400	948	
Lettuce, romaine			102	137	150	84	370	150	405	
Muskmelon	309		2/							
Watermelon	599		2/							
Mustard	398		2/							
Onion	1,432		563	843	2,500	1,930	212	2,500	12,000	
Parsley	173		2/							
Parsnip	174		178	260	275	178	689	275	399	
Peas, smooth (190,725) ^{3/}			71,628	113,444	65,000	94,564	1,032	65,000	63,000	
Peas, gr. wrinkled			77,569	115,757	90,000	122,493	882	100,000	113,000	
Pepper	44									
Pumpkin	45									
Radish	1,860		1,782	2,612	3,500	2,986	278	3,000	11,000	
Rutabaga	558		228	487	400	715	763	600	786	
Spinach	2,329		1,987	4,443	3,500	8,594	546	3,500	6,000	
Squash, summer (428) ^{3/}			370	482	400	612	258	400	2,000	
Squash, winter			184	204	300	432	103	300	2,900	
Tomato	481		357	412	400	471	31	450	15,000	
Turnip	2,087		1,447	1,464	3,000	1,629	567	3,000	5,000	
Miscellaneous	573		2/							

^{1/} 3-year average 1940-42.

^{2/} Vegetable crops for which data are not shown to support a goals program are either (1) not considered essential to the maximum food production program, or (2) sufficient data are not available.

^{3/} Numbers in parentheses represent the total requirement for all varieties of a vegetable; for example, in the case of beans, the requirement of 67,176,000 lbs. includes dwarf green, wax green, pole, and lima beans.

DRY EDIBLE BEANS AND DRY FIELD PEAS

(1) REQUIREMENTS

A. Dry Edible Beans

Due to the current shortage of meat supplies and the increasing need for meat substitutes, it has been recommended by the Civilian Requirements Branch that civilians in the United States be allocated a larger quantity of beans than they have formerly used. From 1935 to 1939, per capita consumption of beans in all forms, including canned beans, was approximately 9.0 pounds. This was reduced in 1942 to approximately 8.3 pounds. The estimated requirement of 14 million bags for civilians would allow 10.9 pounds per capita.

Noncivilian requirements equal 12 million bags. The total civilian and noncivilian food requirements for the 12 months following the production of the 1944 crops amount to 26 million bags of beans (cleaned basis). It has been proposed that stocks should be increased from 3 to 4 million bags during the 1944-45 crop year and that a reserve be set aside in addition to known requirements to take care of contingencies which may develop during the year. This will require an additional 1,500,000 bags which, when added to the 26 million food requirements, gives a total of 27,500,000 bags. Imports are expected to provide for 6 million bags, which leaves a net total food requirement to be met out of 1944 production of 21,500,000 bags (cleaned basis).

B. Dry Field Peas

The requirements for peas have been set at 1.5 pounds per capita, which compares with 1.2 pounds per capita, the average for the 1935-1939 period, and .9 pounds for 1942. On this basis, total civilian requirements will be 1.8 million bags of dry peas. Non-civilian requirements for dry peas are for 2.8 million bags. The total requirements to be met during the year following the harvest in 1944 are 4.6 million bags.

The stocks of peas expected to be on hand at the close of the 1943 crop year appear to be unusually large. Therefore, it appears that the stocks may be reduced by at least 500,000 bags. This, with importation of 100,000 bags, leaves 4 million bags to be met out of the 1944 production.

(2) PRODUCTION CAPACITY

A. Dry Edible Beans

Production capacity estimates developed in each of the bean-producing States indicate a maximum capacity of slightly more than 3.3 million acres of dry edible beans, or about 500,000 acres more than the record plantings in the United States in 1943. In developing these maximum capacity estimates, allowance was made for substantial increases over the 1943 level in sugar beets, potatoes, tame hay and wheat acreages. The State reports reflect, however, a reluctance on the part of State and local personnel to exceed greatly the record

1943 plantings, and they indicate the need for both an "all-out" effort and some readjustment of 1943 State goals if the maximum acreage is to be attained.

From 100,000 to 150,000 additional acres of beans can be obtained in the two major Eastern bean States of New York and Michigan and most of the balance can be obtained in the Great Plains States and in Idaho and California. Increased plantings in the Eastern States and in Idaho and California would be obtained for the most part in established bean-producing areas. In the Great Plains Area some expansion is possible in established irrigated and dryland areas, but a substantial portion of the increased plantings would have to be obtained in new dryland areas where beans are a hazardous crop from the standpoint of both production and wind erosion.

4. Dry Field Peas

Production capacity estimates developed in each of the dry field pea producing States indicate a maximum capacity to produce more than 1,200,000 acres of peas, or 70 percent more than the record acreage seeded in the United States in 1943. The acreage indicated for 1944 was 966,000 acres. Each of the major pea-producing States indicated their ability to expand pea acreages materially although the bulk of the increase indicated is in the major pea-producing area in the Pacific Northwest. Allowance was made in the Pacific Northwest for an increase in wheat acreages which would permit the attainment of the tentative 1944 wheat goals. Allowance was also made for alternating grain with peas to prevent excessive erosion and weed infestation, even though some farmers have grown peas twice in succession after a green manure crop or after summer fallow.

Much of the increase in pea acreages in the Northwest would be at the expense of fallow, sweet clover, barley, and wheat. Replacing summer fallow with peas in the wheat-fallow rotation generally results in a nominal reduction of wheat yields in this area. As a consequence, pea acreages can be expanded materially with little sacrifice of other essential foods. Additional labor and machinery would be required, however, because of the tendency to increase labor and machinery peak loads when peas replace summer fallow.

(3) SUGGESTED GOAL

A. Dry Edible Beans

The suggested 1944 national bean goal of 3,300,000 acres is the same as the 1943 goal. It was the opinion of the committee that although the 1943 planted acreage was 500,000 acres less than last year's goal, the need for dry edible beans as food for, current domestic consumption, the Army, lend-lease requirements, and as a national stock-pile for wartime needs warranted maintaining the goal at its present level. Assuming that the 1944 crop yield will be slightly below the 1937-41 average, the estimated 1944 production for the United States will provide for approximately 500,000 (100-lb) bags in excess of the total 1944 estimated required production.

In distributing the goals to the various states, primary consideration was given to the established bean-growing areas, where production and processing facilities could most easily absorb a larger acreage. However, in order to attain the goal, a relatively large acreage must be planted in the marginal dryland areas. Normally, such areas

probably would not be planted to beans, but it was believed that wartime conditions justify such policy at this time.

The 1944 bean goal provides for major increases in bean acreage in most minor producing areas as compared with 1943 plantings and for slight increases in the major areas with the exception of Colorado. It was felt that the acreage planted to beans in Colorado this year has reached the saturation point and, therefore, the 1944 goal was established slightly below last year's seedings in order to reduce the competition of beans with other crops in Colorado important to the war effort.

Dry Field Peas

The suggested 1944 dry field pea national goal of 875,000 acres is 150,000 acres greater than last year's goal.

The goal as distributed to the States provides that the 1944 plantings exceed the 1943 plantings in all States except Wyoming and Michigan, where the 1944 goal is the same as the 1943 planted acreage. Although the 1943 indicated planted acreage is 16,000 acres greater than the 1943 goal, it will be necessary that 1944 plantings be materially increased in the dryland areas of Washington, Oregon, Idaho, and Colorado if the 1944 goal is attained. It was the opinion of the committee that the 1944 goal should be materially greater than the 1943 goal in view of national stock-pile requirements for high protein human food. Since the 1944 bean goal provides for plantings which have nearly reached the saturation point, peas seem to offer the most logical source for increasing the national stock-pile of high protein foods, since they can be grown in areas where they will only supplant wheat and can largely be handled with available farm machinery used in producing wheat. In addition, it was felt that the increased acreage was desirable in order that the national stock-pile of beans might be maintained at a higher level if peas were substituted for beans as food to some extent in fulfilling post-war needs in conquered areas. Also, domestically the consumption of beans could be reduced and peas substituted if the ration point value of peas were decreased.

(4) REQUIREMENTS FOR LABOR, MACHINERY, FERTILIZER, AND OTHER SUPPLIES

Dry Edible Beans and Dry Field Peas

In recommending state goals we have, as far as practicable, maintained and, if possible, asked for increased acreages of beans and peas in the major bean and pea producing areas. This was done in order that machinery now used in the production of beans and peas will be more efficiently utilized. Before the final goals are determined, careful consideration should be given to items of farm machinery which will be needed to produce the required crop. Although the general increase in the manufacture of all items of farm machinery for 1944 will do much to relieve the critical farm machinery situation that existed in 1943, the following should be considered when setting the 1944 goals:

- a) Where it is necessary to extend seedings to new areas in order to meet the 1944 goals, the machinery now in the area should be adapted as far as possible in the production of beans and peas by use of attachments. This can be done by using cutter attachments on cultivators, pick-up attachments on combines and adapting present cultivating and grain cleaning equipment to the production and cleaning of beans or peas.

- b. That the national production of side delivery rakes be increased to at least 45,000.
- c. That manufacturers of pick-up attachments for combines be encouraged to materially increase their production.
- d. That the production of bean cutters be concentrated on attachments for cultivators instead of on the manufacture of complete machines.

It is further recommended that as soon as 1944 State goals for dry beans and peas have been assigned, State War Boards be requested to submit their requirements for farm machinery needed to meet their goals. This will enable the War Food Administration to arrange for any necessary change in farm machinery production so that the machinery will be available for use in 1944.

There has been considerable complaint received in 1943, from areas which use insecticide containing rotenone in the production of beans and peas of the reduced amount of rotenone used in insecticide. Ordinarily, the insecticide contained one percent rotenone while this year the amount was reduced to one-half of one percent. The producers are of the opinion that the amount of rotenone should exceed one half of one percent. We recommend that in 1944 insecticides which contain adequate rotenone be made available to dry bean and pea growers.

Due to the critical labor situation that exists for general farm labor in the bean and pea producing areas, it is necessary that the recommendations of farm machinery be followed. Labor-saving machines such as combines with pick-up attachments and side delivery rakes can relieve the labor problem to a great extent.

(5) PROCESSING, STORAGE, AND TRANSPORTATION CAPACITY

A. Dry Edible Beans

1. Michigan and New York

Present indications are that the 791,000 acres of beans in Michigan will produce about 6,520,000 bags of beans. This is a large crop of beans for the State and practically all warehouse and storage space will be used. Several thousand bags of the present crop can be stored in a few of the large sugar storage warehouses in the State. Any increase in sugar beet acreage in 1944 will make the space essential for sugar storage in 1944 and 1945.

Because of labor shortage in Michigan, a large number of gravity separators, bag conveyors, automatic weighing machinery, and other labor-saving devices have been given favorable priority ratings; however, there is a very urgent need of 104 electric eye units for sorting the present crop, which have not been passed by the War Production Board. This equipment is essential for cleaning 1943 crop beans, and if approximate 1943 acreage is to be maintained in 1944 and 1945, the need for this equipment will be even more urgent.

New York State will probably be able to clean, handle and store the present crop, but even a small increase in acreage in 1944, because of labor shortage, will likely handicap the New York bean industry.

2. Idaho, Wyoming, Montana, Colorado, Nebraska, and New Mexico

The dry bean cleaning and processing facilities have been expanded and renewed in many instances, through this producing area, with possibly the exception of central and eastern Nebraska and a few other new producing areas. Storage space is already a problem. In southern Idaho, some fruit storage space is available this year that is not likely to be usable another year.

3. California

Apparently, California warehousemen have adequate storage space and approximately enough bean cleaning equipment to handle the present crop; however, a few requests for preference ratings for new warehousing facilities have been received.

4. North Dakota, South Dakota, Minnesota, Kansas, and Texas

Further expansion of bean acreage in 1944 in these new areas probably will require additional cleaning equipment and storage facilities, or arrangements should be made to purchase beans in the dirt for shipment to points having facilities. If the crop is harvested exceptionally clean, it is possible that grain elevators may be able to clean the beans adequately.

B. Dry Field Peas

1. Washington, Idaho, Oregon, and Montana

The 10 million bag production of peas estimated for 1944 will largely be produced in these four states. Priorities for new processing equipment have been issued by the War Production Board for these States. Although processing and storage facilities probably will be used to capacity during the first several months of the season, it is believed that processing facilities, particularly, will be adequate to handle the present crop before the beginning of the 1944 season. In order to use available producing area warehouse space to the best advantage, it will be necessary that Government purchases of peas be moved promptly after processing. More storage space and processing machinery probably will be required for any further pea expansion in 1944.

2. Colorado, Michigan, and Wisconsin

Production facilities in these areas probably can be handled by present storage and cleaning facilities.

There will be a peak movement on both peas and beans during the fall of the year from September to December that will make transportation and warehousing a problem. The heavy movement of peas will be September and October, while beans will be after the first of October through December. The Transportation and Warehousing Branch says it can handle this peak movement in 1944 but warehousing facilities may be limited after the first of January, 1945. It will be very essential that adequate transportation be available during this peak movement as storage in the producing area for both beans and peas is inadequate.

(6) COMMODITY RETURNS

A. Dry Edible Beans

Under current price support relationships, farmers in all States, except the northeast and extreme northwest, increased their bean

plantings materially. Outstanding increases were obtained in the central and plains states. Those increases were obtained despite a late announcement of final 1943 support prices on beans--April 8. By April 8, many farmers had completed their farm plans. Many of them were planting small grains, potatoes, and sugar beets, the principal bean competing crops. Therefore, it may be assumed that the latest announcement on bean price support was not fully reflected in 1943 plantings. On the other hand, farm plans were made and possibly a limited acreage was planted under the assumption of incentive payments on beans, but this must be discounted somewhat because withdrawal of incentive payments was realized late in March.

A strong patriotic appeal was utilized in some of the largest producing areas. Very real labor fears, now somewhat alleviated, and a late, wet spring, particularly in the central States, hindered plantings of bean competing crops, thus favoring beans. Notwithstanding these factors favorable to bean plantings, the 1943 goal, which is again being requested for this year, fell short of being reached by one-half million acres. Furthermore, the 1944 suggested State goals are above the 1944 wartime capacity figures in 14 of the 22 bean States. In view of these facts, present bean support prices appear none too high to reach the goal and very likely will be too low if prices of competing crops, particularly potatoes and sugar beets, are allowed to advance beyond current levels. On the whole, however, it is believed that, insofar as price alone is a factor, bean prices under the current support program are reasonably adequate to obtain proposed 1944 goals in most States, but other encouragements should be added. Following are a few suggestions:

War risk insurance on bean plantings, at least to the extent of covering cash outlays for the crop, should be considered. It must be realized that to meet the goals, new and inexperienced growers must be recruited in both old and new producing areas. Risks will be involved. The patriotic appeal utilized last year should be expanded into all principal producing areas. The loan program should be continued and possibly reconsidered in an effort to assure a guarantee of the largest possible return to the grower. The program should be announced early, by September 5, 1943, if possible, in order to forestall heavy plantings of fall wheat in bean areas.

B. Dry Field Peas

Since planting of dry peas in 1943 exceeded the goal, the committee believes that the present support price, so far as price alone is a factor, is adequate to reach the 1944 goal.

(7) PROBLEMS IN OBTAINING SUGGESTED GOAL and (8) RECOMMENDATIONS FOR GOAL ATTAINMENT

- a. It was very definitely the opinion of the committee that the probability of attaining the goals would to a large extent be governed by the favorable or unfavorable relationship of a support price established for beans and peas with other competing crops adaptable to the area. The support price should be announced not later than September 5 in order that the winter wheat farmer may be informed of such price prior to planting his wheat and consequently can reserve the required acreage for beans.
- b. A farm loan and purchase program similar to the Commodity Credit Corporation's existing loan and purchase program should be provided.

- c. It is suggested that county AAA committees be designated as agents of the Commodity Credit Corporation to purchase beans and peas directly from the farmer in those instances where local cleaning facilities and reluctance on the part of dealers to handle the beans will not allow the farmer to market his beans at the support price within a reasonable time.
- d. In the marginal bean-growing areas and areas where they have not been grown before and in some established areas where there is considerable risk of growing beans, some sort of war risk insurance or guaranteed cost of production covering out-of-pocket expenses should be provided. Unless some such program is offered, many farmers will hesitate to plant beans if other less risky and equally remunerative crops can be grown.
- e. Generally, the farm machinery available for growing other crops is adaptable to the growing of beans and peas although attachments will have to be provided for some of the machines. From a new machinery standpoint, if the goals are to be attained, it will be necessary that pick-up attachments for combines, bean cutter attachments for cultivators, and side-delivery raises be adequately provided to save labor. It may be more difficult to obtain the goals for 1944 in some areas where beans replaced sugar beets last year because of the potential shortage of labor. Such acreage may be seeded to sugar beets next year as this year's experience indicated that there was adequate labor to handle the crop.
- f. In order that the beans may be readily marketed, it will be necessary that an adequate number of electric eyes for sorting be made available in the Great Lakes Area. In addition to the regular bean cleaning equipment, local elevators should plan to utilize their wheat cleaning equipment for cleaning beans which can be done in certain areas.
- g. In those States where the 1944 goal is less than the 1943 goal, the State should be advised that such decrease is not an indication that beans or peas are not needed but that the decrease was made in order to allow for an increase in the acreage of other competing war crops, and that it is still above the 1943 planted acreage, *except in Colorado*.
- h. Adaptable varieties of good seed should be made available.
- j. Since the growing of beans and peas frequently results in erosion control problems, farmers should be properly advised and informed as to the farming practices which ought to be followed to avoid serious soil erosion.

DRY BEANS AND PEAS

Table I - Estimated requirements for 1944 and 1945
(In thousands of 100-lb. bags, primary distribution weight)

Commodity	Development of requirements in thousands of 100-lb. bags															
	Civilian per capita consumption of food (In pounds)			Food requirements a/			Industrial non-food requirements			Stocks b/			Imports	Net total food and industrial non-food requirements to be met out of production (6+9+13-14)		
				1935-1939	1942	Estimated requirements a/	Civilian	Non-civilian	Total	Civilian	Non-civilian	Total			Beginning of year	End of year		Net change in stocks
	Operating	Desired reserve														
			1										2	3		4	5		6	7	8	9	10	11	12	13	14	15
Dry beans	9.0	8.3	10.9	14,000	c/12,000	26,000	0	0	1944		3,000	4,000	500	1,500	6,000	21,500
Dry peas	1.2	.9	1.4	1,800	2,800	4,600	0	0	0	0	3,600	2,950	150	- 500	100	4,000
Dry beans	9.0	8.3	10.9	14,000	11,500	25,500	0	0	1945		4,000	4,000	500	500	6,000	20,000
Dry peas	1.2	.9	1.5	1,950	2,500	4,450	0	0	0	0	2,950	2,500	150	- 300	100	4,050

a/ Crop years 1944-45 and 1945-46.

b/ Stocks refer to crop years as follows: Dry beans, year beginning September 1, 1944 for 1944-45; September 1, 1945 for 1945-46; dry peas, year beginning August 1, 1944 and 1945 for crop years 1944-45 and 1945-46 respectively.

c/ Includes 100 percent of world requirements for Liberated Areas (3,374 thousand 100 pound bags). May be increased.

Food Distribution Administration
Requirements and Allocations Control
August 14, 1943

Table IA - (beans & peas)

DRY BEANS AND PEAS1944 PRODUCTION GOAL COMPARED WITH ESTIMATED REQUIREMENTS FOR
FOOD AND SEED, PLUS ALLOWANCE FOR DOCKAGE

(1,000 100-lb. bags)					
Total Food & ;	:	:	:	:	:
Industrial ;	Seed for ;	Dockage ;	Total ;	Production	
Non-Food ;	Planting ;	Allowance ;	Production ;	Goal 1944	
Requirements ;	in 1945 ;	from 1944 ;	Required ;		
1944 Crop ;	:	Crop ;	1944 ;		
(Cleaned Basis)	(Cleaned Basis)		(Field Run)		

Dry Beans

21,500	2,056	1,931	25,487	25,979
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Dry Peas

4,000 3,550	3,100	1,163	8,263 7,813	9,874
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State	Production		Average Yield		1944 Goal	
	Average	1943	1937-41	Assumed	Production (1,000	Acres
	1937-41	1942	Indicated	1944	100-lb. bags)	(1,000)
(1,000 100-lb. bags)						
Maine	104	83	102	1,102	1,050	15
Vermont	15	12	12	640	620	3
New York	1,307	1,436	1,188	837	790	200
N.E. Div.	1,426	1,531	1,502			218
Michigan	4,624	6,024	6,588	833	800	265
Wisconsin	15	19	42	516	510	10
Minnesota	18	26	56	557	540	25
South Dakota			18		900	10
Nebraska	292	560	1,012	1,233	900	125
M.O. Div.	4,949	6,651	7,716			1,035
Texas			36		300	40
South Div.			36		300	40
North Dakota			16		900	5
Kansas	2	5	32	140	360	40
Montana	241	338	659	1,271	1,150	80
Idaho	1,700	2,025	2,250	1,466	1,400	205
Wyoming	726	982	1,292	1,215	1,100	130
Colorado	1,560	1,903	2,862	418	400	570
New Mexico	743	1,079	888	302	300	400
Arizona	55	68	69	404	420	20
Utah	37	54	64	624	620	20
Nevada						1
Washington	34	56	57	1,054	1,050	7
Oregon	13	42	44	678	1,200	4
California	4,910	4,894	5,559	1,319	1,250	525
West Div.	10,021	11,446	13,791			2,007
U.S.	16,396	19,608	22,845	831	808.3	3,300

Table 5 (beans) DRY FERTILE BEANS: SUGGESTED 1944 ACREAGE WITH COMPARISONS

State	Acreage (Thousands)										Percent 1944 Goal to 1937		
	Average		1945		1943		1944		1944		1944		1945
	1937-41	1942	Goal	Indicated	Prod.	Goal	Capacity	Goal	Capacity	Prod.	Goal	Indicated	
Maine	10	9	10	9	15	15	15	100	167	157	157	157	157
Vermont	2	2	3	2	3	3	3	100	133	133	133	133	133
New York	156	158	200	142	200	200	200	100	127	141	141	141	141
N.E.Div.	168	169	213	153	218	218	218	100	129	142	142	142	142
Michigan	571	633	826	791	683	865	865	98	137	108	108	108	108
Wisconsin	3	3	10	7	7	10	10	143	323	143	143	143	143
Minnesota	3	5	20	10	15	25	25	167	500	250	250	250	250
South Dakota	24	38	100	101	6	10	10	167	529	124	124	124	124
Nebraska	601	679	961	915	1,027	1,035	1,035	101	152	118	118	118	118
N.C.Div.													
Texas				20	35	40	40	114	200	200	200	200	200
South.Div.				20	35	40	40	114	200	200	200	200	200
North Dakota	1	1	5	3	5	5	5	100	167	167	167	167	167
Kansas	19	26	75	10	10	40	40	400	4,000	400	400	400	400
Montana	116	141	240	66	78	80	80	103	308	121	121	121	121
Idaho	60	80	140	157	191	205	205	107	145	131	131	131	131
Wyoming	373	350	590	115	117	130	130	111	162	113	113	113	113
Colorado	238	275	425	584	550	570	570	104	163	92	92	92	92
New Mexico	14	14	20	300	400	400	400	100	145	133	133	133	133
Arizona	6	6	17	15	17	20	20	118	143	133	133	133	133
Utah				10	20	20	20	100	333	200	200	200	200
Nevada		*		*	1	1	1	100					
Washington	3	5	9	5	4	7	7	175	140	140	140	140	140
Oregon	2	3	5	4	3	4	4	133	133	100	100	100	100
California	371	386	600	452	438	525	525	108	136	116	116	116	116
West.Div.	1,208	1,287	2,126	1,721	1,884	2,007	2,007	106	156	117	117	117	117
U.S.	1,977	2,135	3,300	2,807	3,164	3,300	3,300	104	155	113	113	113	113

* Less than .5

Price Data For 1944 Production Goals

Returns from Dry edible beans

Commodity

A. Historical and Present Prices Per Unit (100 lb.)

(1) January 1935 - December 1939 average	\$ <u>3.47</u>
(2) 1941 average	\$ <u>4.57</u>
(3) 1942 average (11 mos.)	\$ <u>5.30</u>
(4) July 1943 average	\$ <u>5.61</u>

B. Price Ceiling Provisions

(1) Parity or comparable price July 1943	\$ <u>5.53</u>
(2) *Highest price January 1 - September 15, 1943	\$ <u>4.93</u>
(3) Price ceiling July 1943 1/	\$ <u>5.60</u>

C. Price Support Provisions

(1) Present support price (1943) 2/	\$ <u>5.90</u>
(2) Present additional inducements	\$ <u> </u>
(3) Total gross returns	\$ <u> </u>
(4) 90 percent of parity	\$ <u>5.00</u>

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1) July 1943 Index Price of Commodity	
Base 1909-14	\$ <u>166</u>
(2) July 1943 Index Price of Commodity	
Base 1935-39	\$ <u>162</u>
(3) July 1943 Index Commodities Used in Production	
Base 1909-14	\$ <u>164</u>
(4) July 1943 Index Commodities Used in Production	
Base 1935-39	\$ <u>129</u>
(5) *July 1943 Index of Farm Wages	
Base 1935-39	\$ <u>225</u>
(6) Unit returns to equal return from competing crops	\$ <u> </u>

E. Suggested 1944 Price

(1) Suggested average price to farmers	\$ <u> </u>
(2) Suggested inducements (average value per unit)	\$ <u> </u>
(3) Total suggested return per unit	\$ <u> </u>

1/ Estimated farm price derived from ceiling prices by varieties at country shipping points.

2/ Estimated farm price equivalent to support price of \$6.50 per cwt for principal varieties at country shipping points. Support prices for Standard & Baby lima, and kidney beans is \$7.50 for #1 Beans, f.o.b. country shipping points.

* Seasonally adjusted

Table 2 (peas)

PRODUCTION OF DRY FIELD PEAS

State	Production			Average Yield			1944 Goal	
	Average :	1942 :	1943 :	1937-41 :	1942 :	Assumed :	Production (1,000 : Acres	
	: 1937-41 :	: 1942 :	: Indicated :			: 1944 :	: 100-lb. bags) :	(1,000)
	(1,000 100-lb. bags)							
								Pounds
Michigan	45	37	24	677	930	700	28	4
Wisconsin	55	52	60	792	750	750	68	9
N. C. Div.	100	89	84	715.4			96	13
North Dakota			81			750	75	10
Montana	252	492	672	1,176	1,230	1,150	690	60
Idaho	640	1,550	2,232	1,039	1,220	1,050	2,883	275
Wyoming			24					2
Colorado	122	270	243	263	537	350	210	30
Washington	1,335	4,199	5,822	976	1,666	1,300	4,940	380
Oregon	61	560	840	1,230	2,238	1,300	975	75
West Div.	2,410	7,071	9,919	395.6			9,778	362
U. S.	2,510	7,160	10,003	885.9	1,429.1	1,128.7	9,874	375

Table 5 (poor)

DRY PEAS: SUBSTITUTED 194, JOURNAL OF COMPARISONS

	Average (Thousands)										Percent 1934 Goal or			
	Average 1937-41	1942	1943	1948	Prod. Capacity	1944	1949	1952	1948	1950				
Michigan	7	4	7	4	2	4	200	100	100					
Wisconsin	7	7	10	8	10	9	90	129	112					
N. C. Div.	14	11	17	12	12	18	108	118	108					
North Dakota				9		10			111					
Montana	21	40	60	56	58	60	103	150	107					
Idaho	62	127	241	190	345	275	80	217	145					
Wyoming				2	6	2	35		100					
Colorado	44	46	35	61	75	60	80	160	118					
New Mexico					3									
Arizona					2									
Washington	135	252	344	265	390	380	97	151	104					
Oregon	4	26	28	56	75	75	100	500	134					
West. Div.	266	490	708	729	954	862	90	176	118					
U. S.	280	501	725	741	966	975	91	175	718					

Table 4 (cont.) DRY FIELD PEAS: ACREAGE, MAXIMUM WARTIME CAPACITY WITH COMPARISONS

State	1942 : (1,000 acres)	1943 : (1,000 acres)	Wartime Capacity : (1,000 acres)		Percentage : 1943 of : Maximum : 1942 : of 1942	
			1943	1944	1943	1944
Michigan	4	4	2	2	50	50
Wisconsin	7	8	10	10	143	143
N. C. Div.	11	12	12	12	109	109
North Dakota		9				
Montana	40	56	58	70	145	175
Idaho	127	190	345	422	272	332
Wyoming		2	6	7		
Colorado	46	51	75	95	163	203
New Mexico			3	3		
Arizona			2	2		
Washington	252	365	390	426	155	169
Oregon	25	56	75	200	300	800
West. Div.	490	729	954	1,225	195	250
U. S.	501	741	966	1,237	193	247

Table 5 (peas)

Price Data for 1944 Production Goals

Returns from Dry field peas
Commodity

A. Historical and Present Prices Per Unit (cwt.)

(1) December 1935 - December 1939 average	\$ 2.11
(2) 1941 average	\$ 3.95
(3) 1942 average	\$ 4.50
(4) July 1943 average	\$ 4.72

B. Price Ceiling Provisions

(1) Parity or comparable price July 1943	\$ 3.45
(2)*Highest price January 1 - September 15, 1943	\$ 5.66
(3) Price ceiling July 1943	1/ \$

C. Price Support Provisions

(1) Present support price (1943)	2/ \$ 4.65
(2) Present additional inducements	\$
(3) Total gross returns	\$
(4) 90 percent of parity	\$ 3.10

D. Factors Affecting the 1944 Price Needed to obtain Goal

(1) July 1943 Index Price of Commodity	
Base 1909-14	\$ 226
(2) July 1943 Index Price of Commodity	
Base 1935-39	\$ 224
(3) July 1943 Index Commodities Used in Production	
Base 1909-14	\$ 164
(4) July 1943 Index Commodities Used in Production	
Base 1935-39	\$ 129
(5)*July 1943 Index of Farm Wages	
Base 1935-39	\$ 225
(6) Unit returns to equal return from competing crops	\$

E. Suggested 1944 Price

(1) Suggested average price to farmers	\$
(2) Suggested inducements (average value per unit)	\$
(3) Total suggested return per unit	\$

- 1/ Ceilings are the individual sellers highest price between September 28 and October 2, 1942. No estimate of the equivalent farm price is available.
- 2/ Tentative estimate of farm price equivalent to announced support price of \$5.65 per cwt. for U.S. #1 peas, in bags, f.o.b. carrier at country shipping points.

* Seasonally adjusted

Prior to our entry into the war there was a general feeling that with our considerable quantity of standing timber it would not be very difficult to supply all the forest products this country could use as well as large quantities for export. However, it became apparent soon after our large scale war construction program was started that there would not be enough lumber to satisfy military needs and also all ordinary civilian uses. Many steps were taken to increase production, but it was evident, owing in great measure to the delay in recognizing the gravity of the situation, that this alone would not solve the critical situation. Since there was not a sufficient quantity of wood products for all needs it became necessary for the available supply to be channeled to the most essential uses. This was accomplished by the War Production Board through the issuance of a number of Conservation and Limitation Orders which gave first claim on lumber and other forest products to the military forces and restricted the remainder to the more essential civilian uses. The pulp and paper branch of the industry is now under rigid control as to production and distribution. In addition to the restrictions on end use, maximum prices have been established on all major wood products.

Production of forest products in 1941 was at a record high for the past decade. Our "defense program" and the war in Europe had created good markets and there was sufficient labor and equipment to handle the logging and milling. With our entry into the war the demand for wood products again increased but production decreased and early in 1942 lumber was considered "critical" along with rubber, steel, and copper. The drop in production has continued into this year and from present indications some further declines can be expected next year.

The decline in production is due not to a lack of timber or milling capacity but to the inability to produce sufficient logs and bolts for manufacturing. In some instances, inaccessibility or the scattered distribution of high quality timber has retarded the needed increase in production of important items.

The chief factors hindering production are: First and most important, a shortage of woods labor caused by men being inducted into the armed forces and by large numbers leaving for better paid jobs in defense factories. Shortage of equipment and repair parts is the second most important factor. In some regions, particularly the Pacific Northwest, during the past winter months unusually severe weather conditions had an adverse effect on production. Tire shortage is not as serious at present as was expected a year ago. Another deterrent to production has been the confusion of changing over from a peace time production to a war time basis which meant adjusting to new markets, manufacturing new products, and operating under numerous new government restriction and price orders. This change over is still causing the small operators considerable difficulty.

In 1942, production of lumber amounted to 36.4 billion board feet, net imports were 1 billion feet, while actual consumption was approximately 42 billion board feet. The 4.6 billion board feet discrepancy between production plus net imports and consumption was made up by drawing on stocks which were already 30 percent below normal at the beginning of 1942. The lumber requirements for military and essential civilian use for 1943 are estimated at present at 36 billion board feet. More lumber is badly needed by farmers and for other civilian use, and a large quantity is needed to replenish the badly depleted stocks. The problem of stocks could prove to be very serious as there is now on hand only a very limited quantity of lumber that could be made available in case of emergencies such as serious fires, hurricanes, or floods. From present indications, production for this year will amount to about 32.5 billion board feet, and net imports will be about 650 million feet, which will mean a further drawing on the present stocks which are now at an all time low. Because of the importance of the food packaging program, particularly for overseas shipments, agriculture has a very real interest in the lumber supply situation.

The production and requirements picture for other forest products is much the same as that for lumber. Not enough pulpwood, fuelwood, veneer and plywood, and cooperage are being produced to fill all essential requirements.

The farmer has always been an important producer as well as consumer of forest products. The 139 million acres of commercial farm woodlands in the United States is the source of almost one-third of our wood products. In the Northeast, 56 percent of the sawlogs comes from farms; South and Appalachian region, 45 percent; Central and Prairie States, 90 percent; and

2-Forest Products

the Lake States, 12 to 16 percent. About 38 percent of the United States supply of pulpwood, 60 percent of the charcoal wood, and nearly all of the fuelwood come from farms. Farm woodlands are also the source of a large portion of our hickory and ash for handles, dogwood for shuttles, walnut for gun stocks, oak for ship timbers, and many other wood products that are needed during the present war emergency.

Even with the restrictions on use it is estimated that the farmer will use next year 4 billion feet of lumber for farm buildings, 2 billion feet for agricultural containers, and 28 million barrels and kegs. It is estimated that Agriculture will use over 50 percent of next year's hardwood veneer production to package food for shipment in this country and abroad. In addition, a large amount of paper and paper products will be used for shipping farm produce. The farmer will be the biggest user of the estimated 86 million cords of fuelwood to be produced next year.

The critical situation with respect to wood products needed for the war makes it extremely important for farmers to increase the harvesting and sale of timber products. They can accomplish this without destroying or seriously impairing the woodland. Destructive cutting is not necessary or desirable to meet the present emergency. Because of acute labor shortages, as much as possible of the harvesting and marketing of the timber should be performed by the labor available on the farm. This, however, may not be easy, as the farmer is already confronted with the same shortages of labor and equipment as other industries face. But making the best use of available labor and equipment for logging during slack farming seasons and offering timber for sale are ways that will offer immediate help towards increasing production.

The Department of Agriculture through its Forest Service, Extension Service, and Soil Conservation Service, has facilities to aid the farmers in the proper harvesting, marketing and utilization of their forest products. The Department, on request of the War Production Board, is undertaking a program to increase the production of forest products. This program known as the Timber Production War Project will aid farmers as well as other timber producers with problems that are now hindering production.

The following tabulation shows production goals as established for 1944 and a comparison of these goals with actual 1942 production and estimated 1943 production:

Forest Products Production and Goals

Product	Production		
	1942	Estimated 1943	1944 Goals
Lumber Mil. bd. ft.	36,402	32,500	1/ 32,240
Pulpwood M Cds.	14,722	11,168	10,800
Veneer Logs Mil. bd. ft.	1,610	1,500	1,858
Fuelwood M Cds.	76,000	80,000	86,000
Tannin Bark & Wood M Cds.	654	582	702
Chemical Wood M Cds.	800	700	780
Cooperage Mil. barrels & kegs	71	74	89
Fence Posts Mil. pcs.	400	320	320
Polos M pcs.	6,000	3,800	3,800
Piling M pcs.	6,000	3,600	2,500
Cross ties (hewn) M pcs.	30,000	24,000	20,000
Misc. Logs & Bolts Mil. bd. ft.	500	500	500

1/ This is a minimum figure based on scheduled military and essential civilian needs. It makes no provision for increases in the military program, for unforeseen contingencies, nor for replenishment of depleted stocks. Lumber stocks are now so badly depleted that they cannot provide the safety factor that they did in the past two years. In 1942, stocks contributed 4.6 billion feet and in 1943, it is estimated, will contribute 3-1/3 billion feet to make up the deficits in production.

PRODUCTION GOALS FOR MEAT ANIMALS FOR 1944

Summary

The suggested production goal for the calendar year of 1944 for meat is a total slaughter of 33.7 million cattle and calves, 22 million sheep and lambs and 104 million hogs. A total slaughter of these numbers of animals seems to be about the highest production of meat feasible in 1944 for each class of livestock. The slaughter of 104 million hogs will be the largest on record, notwithstanding the recommended decrease of 17 percent in the 1944 pig crop compared with the pig crop of 1943. Achievement of the sheep and lamb slaughter goal will not involve any reduction in the number of sheep and lambs on farms and ranches. The numbers of cattle and calves on farms on January 1, 1945 will be reduced about 2.6 million head, but this rate of slaughter will not jeopardize a high level of production and slaughter in 1945 and the years immediately following. The numbers of cattle and calves still would be 13 million head more than at the beginning of the present upward cycle in 1938.

The estimated yield from these numbers of animals slaughtered would be about 26.2 billion pounds of meat and 3.1 billion pounds of lard. Of the total production of meat, about 11.8 billion pounds would be beef and veal, about 880 million pounds would be lamb and mutton, and about 13.5 billion pounds would be pork.

The production goals for meat and lard are slightly above the estimated total minimum requirements for meat and lard for all purposes that must be met from 1944 production. But inasmuch as the effective civilian demand for meat and lard will exceed considerably the estimated minimum requirements, and since ranges and pastures are generally heavily stocked, it is suggested that the goals be set at the highest level of slaughter feasible in 1944. The production of lamb and mutton will be 70 million pounds below the estimated requirements for these classes of meat, but as the goal for slaughter of cattle and calves exceeds the estimated requirements for beef and veal, it is assumed that a substitution in consumption can be made.

Requirements for 1944

The total minimum requirements for all purposes in 1944 for beef and veal, lamb and mutton, and pork combined are 27,043 million pounds. These requirements are 2,124 million pounds, or 8 percent, larger than the supply expected to be available this year. Non-civilian requirements, however, are 2,405 million pounds more than in 1943. The total requirements for lard are 3,249 million pounds in 1944 compared with an expected supply of 2,965 million pounds in 1943. Of the total requirements for lard in 1944, at least 1,060 million pounds will be for non-civilian use--mostly for lend-lease. Military requirements for lard are negligible.

Adequacy of Goals and Requirements

The goals which are somewhat above the minimum requirements will provide approximately 123.9 pounds of meat and 14.5 pounds of lard per capita for civilians. This rate of consumption would be 2.4 pounds of meat less per capita than the average annual rate of consumption from 1935 to 1939, and 10.6 pounds of meat less per capita than was consumed in 1942. The estimated total minimum requirements for meat would make possible continuation of the present rationing program.

Prospective Problems and Recommendations

The prospective problems in attaining the goals for each class of livestock and recommendations for alleviating or overcoming them are set forth in detail in the separate reports on hogs, beef cattle, sheep, and wool. Outstanding among the problems that confront farmers and ranchers in meeting the goals for meat and lard production is the shortage of feed

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and high rates of feeding of concentrates per unit of livestock production. Hog producers are confronted with the problem of so reducing the number of pigs farrowed and the weight of hogs marketed as to provide sufficient feed for attaining the goals for dairy and poultry products. Inadequate processing facilities may be a problem in the marketing and slaughter of hogs during the peak season of slaughter in December and January, 1943-44. Transportation difficulties will become increasingly serious and may be critical during the period of heavy movement of cattle and sheep from ranges in October and November. Reduced trucking facilities may be severely taxed during the hog marketing peak and may also be inadequate for the movement of other livestock and feed, and the general operation of farms and ranches. The supply of railroad stock and refrigerator cars probably will be adequate, but a general congestion in rail traffic may develop.

With the 1943 corn crop now estimated at about 2.9 billion bushels, the restricting effect of short feed supplies upon livestock production in 1944 is less critical than seemed likely at the beginning of the growing season when conditions were unusually adverse. Supplies of wheat and rye available for feed also may be greater than previously has been indicated. But even with the additional supplies and with the acreages of feed grains pushed upward to maximum capacity it will be necessary to conserve feed in all possible ways to assure attainment of each of the 1944 livestock production goals. During the 1942-43 feeding year, the rates of feeding of concentrates per unit of livestock production have been 7.7 percent above the average for the 5-year period 1937-38 to 1941-42. Every possible effort should be made to overcome the reduction in production efficiency due to insufficient care, overcrowding, disease, and possibly some wasteful feeding practices. Department agencies, State Agricultural Extension Services, veterinarians and others in a position to contribute, should cooperate in an educational campaign for livestock sanitation, prevention of disease, and improved feeding practices.

The shortage of workers probably will continue to hinder the production of sheep and lambs more than that of cattle or hogs.

Table I.- Estimated minimum requirements for 1944 and 1945 and production goals for 1944 1

[illegible]

million

Summary

The suggested 1944 production goal for pork and lard is a total slaughter of 104 million hogs weighing, on the average, 230 pounds, which would be about 25 pounds less than the average market weight of hogs this year. The estimated dressed weight yield from this number of hogs is 13,520 million pounds of pork and 3,120 million pounds of lard. The slaughter of 104 million hogs can be obtained from the carry-over of hogs from the 1943 pig crops and marketings in the last quarter of 1944 from a total pig crop in 1944 of 105 million head of which 62 million head would be farrowed in the spring.

The suggested 17 percent decrease in the pig crop in 1944 compared with 1943 is a somewhat smaller reduction than the 1944 production capacity for hogs as estimated in the State reports on wartime production capacity. But the major factor limiting hog production during 1944 and 1945, namely feed supplies, now appears to be slightly less critical than was assumed by the State Committees in connection with their appraisal of the situation.

Requirements for 1944 and 1945

The total minimum requirements for pork and lard for all purposes in 1944 are about 14.8 billion pounds and 3.2 billion pounds, respectively. Tentative estimates of requirements for 1945 are 13.5 billion pounds of pork and 3.0 billion pounds of lard. These are minimum requirements. The military, lend-lease and other non-civilian needs are more likely to be more rather than less and they may exceed the current estimates plus the unallocated reserves. The civilian requirements will make possible the continuation of the current meat rationing program. About 1,300 million pounds of pork will be carried over from 1943, hence about 13.5 billion pounds would have to be met from 1944 production. The total minimum requirements for lard are 3.2 billion pounds in 1944 and 3.0 billion pounds in 1945. These requirements after allowing for the carry-over from the previous year, can be met from approximately the same slaughter as would be needed for meeting the pork requirements.

Prospective Problems in Attaining Goals

The problems of hog production in 1944 are not so much that of attaining the requirements for pork and lard production estimated for 1944 as that of adjusting market weights and the size of the next year's pig crop to feed supply available after making provision for the production of dairy and poultry products which are so badly needed. The problem of curtailment of hog production to the goal for a pig crop of 105 million head is directly related to the hog-corn price ratio. The problem of getting hogs marketed at lighter weights is also related to this ratio and to differentials in the prices of different weights.

Another phase of the problem of the conservation of available feed supplies is to reverse the tendency towards excessive use of feed per unit of livestock production.

Recommendations

1. Every possible effort should be made to avoid continuation of the reduction in production efficiency which occurred last year. Department agencies, State Agricultural Extension Services, veterinarians, and others should cooperate in an educational campaign for livestock sanitation, prevention of disease, and improved feeding practices.
2. The Department in buying hog products for Government account could give preferential support to the prices of hogs of lighter weights by accepting offers of pork cuts from light hogs at prices relatively higher than those for the cuts from heavy hogs.
3. Hog production is moderately profitable with a hog-corn price ratio of 11.5 to 1. This ratio probably could be expected to stabilize hog production at about the 1942 level when combined with the present policy of forward Government support of the price of hogs. It would seem desirable, therefore, for the Department to recommend an advance in the ceiling price of corn from \$1.07 to \$1.15-\$1.25 per bushel.
4. It is recommended that the Department announce a definite price support policy as early as possible (before breeding operations start this fall) for hogs to be marketed from the 1944 spring pig crop. It is thought that the present level of price support might be continued beyond September 1944 if the ceiling price of corn is raised as suggested.

Production and Marketings of Hogs During 1943

The largest pig crop on record--127 million head--will be produced this year. It will be about 21 percent more than the large pig crop of 1942 and about 6 percent more than the recommended goal for 1943. Hogs also are being marketed at record weights which are somewhat above the average slaughter weight recommended as a goal for 1943. The combination of a large number of pigs farrowed and heavy slaughter weights will give a record production of pork and lard this year, but not as high as was expected would be obtained from the farrowing goal set for 1943. This is because fall pigs were a relatively larger proportion of the total pig crop than was recommended and because of unusually heavy death losses of pigs.

Despite the heavy death losses, the increased production of hogs, together with an increased production of poultry, has progressively depleted reserve stocks of feed grains. Present levels of hog production cannot be continued next year. If a reasonable wartime reserve supply of feed grains is to be maintained, the pig crop in 1944 must be less than the pig crop of 1943, notwithstanding the continued large requirements for meat and lard for meeting wartime needs.

Requirements for Pork and Lard in 1944 and 1945

The total amount of pork and lard required in 1944 for all purposes has been estimated at 14,790 million pounds of pork and 3,249 million pounds of lard. Tentative estimates of the requirements for 1945 are 13,472 million pounds of pork and 2,959 million pounds of lard. The distribution of these total requirements are as follows:

Item	Food requirements			Unal-located reserve	Carry-over	Total
	Civilian	Non-civilian	Total			
	Million pounds	Million pounds	Million pounds			
<u>1944</u>						
Pork	7,320	5,170	12,490	1,000	1,300	14,790
Lard	1,839	1,060	2,899	200	150	3,249
<u>1945 1/</u>						
Pork	6,242	4,930	11,172	1,000	1,300	13,472
Lard	1,614	995	2,609	200	150	2,959

1/ Tentative.

These are minimum requirements. The military, lend-lease and other non-civilian needs are more likely to be more rather than less and they may exceed the current estimates plus the unallocated reserves. The civilian requirements will make possible the continuation of current meat rationing program. But civilian demand will be very active, with civilian consumers willing to take substantially more pork at ceiling prices.

The per capita requirements for the civilian population in 1944 and 1945, compared with the per capita consumption by civilians in 1935-39 and in 1942 are as follows:

Item	Consumption		Requirements	
	1935-39	1942	1944	1945
	Pounds	Pounds	Pounds	Pounds
Pork	56.5	59.3	57.1	48.5
Lard	11.0	14.3	14.3	12.5

Supplies for 1944 and 1945 Prospective Stocks and
Production Desired

Stocks of pork that will be carried over from 1943 are estimated at 1,300 million pounds. The same carry-over into 1945 is assumed. Production of pork, therefore, will have to be 13,490 million pounds in 1944 and 12,172 million pounds in 1945 in order to meet the minimum food requirements for domestic consumption, for exports, and for carry-over. Assuming an average yield of dressed pork (fresh basis) of 130 pounds per hog, a total slaughter of about 104 million hogs would be required in 1944 and 94 million in 1945 to meet the minimum requirements in the respective years. The assumed yield of pork per hog is 10 pounds lower than the estimated yield during 1943 because as stocks of feed progressively decrease, it will be desirable to plan to market hogs at medium weights to provide elasticity for an emergency readjustment of livestock production to unforeseen changes in the prospective feed supply.

The storage holdings of lard are expected to be 150 million pounds on January 1, 1944, and the same carry-over is assumed at the end of the year. Hence, the production of lard needed to meet total minimum requirements will be 3,099 million pounds in 1944 and 2,809 million pounds in 1945. Assuming an average yield of 30 pounds of lard per hog, the requirements can be met from approximately the same slaughter in each year as would be needed for meeting the pork requirements.

Production Capacity in 1944 and 1945

Pigs Farrowed

The production capacity for hogs in the 12-month period beginning October 1, 1944 and for the duration of the emergency will be determined largely by the current production of feed grains and by the priority of allocation of these grains among the different classes of livestock. Compared to good dairy cows and laying hens, hogs are less efficient converters of feed grains into the food elements which are needed most. Hence, within certain limits hogs are a residual claimant on available supplies of feed grains.

Assuming that the proposed 1944 goals for the production of feed crops and for dairy and poultry products will be attained and that a reasonable wartime reserve supply of feed grains will be maintained, there will be approximately 43 million tons of feed grains available for feeding hogs during the 12-month period beginning October 1, 1944 (after making allowances for horses, sheep and other cattle). Translated into terms of the size of the pig crop for 1944, the prospective supply of feed grains that will be available for hogs will provide feed for feeding a pig crop of about 105 million pigs to an average market weight of 230 pounds. The division between spring and fall farrowings in 1944 would be 62 million spring pigs and 43 million fall pigs. Assuming the 1932-41 average number of pigs saved per litter, this would mean about 10.2 million sows for farrowing in the spring and about 7.0 million sows for farrowing in the fall. Compared with recent years, a pig crop of 105 million head would be about 17 percent less than the 1943 pig crop and the same as the 1942 pig crop.

Assuming further that a production of feed crops and dairy and poultry products equivalent to the 1944 goals would be attained again in 1945 and that the carry-over of feed grains would not be further reduced on October 1, 1946, there would be feed grains available in 1945-46 for feeding a pig crop of about 100 million pigs to an average market weight of 230 pounds.

Number of Hogs Slaughtered

The number of hogs for slaughter in calendar year of 1944 is more closely related to the 1943 pig crop than to the 1944 pig crop because about half of the 1943 spring pigs and all of the 1943 fall pigs will be marketed in 1944. Thus the carry-over of hogs on farms on January 1, 1944 from the 1943 pig crop, even when combined with a smaller pig crop in 1944, will give the largest slaughter on record as indicated in the following table. But in 1945 the number slaughtered will reflect the smaller pig crop of 1944 and it would be only slightly larger than the number slaughtered in 1942.

Hogs: Feasible number on farms January 1, pig crop, and slaughter, 1944 and 1945, with comparisons

Item	:	:	:	:	:	Feasible	
	:	1939	1940	1941	1942	1943	1944 1945
	:	:	:	:	:	1/	:
	:	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
	:	head	head	head	head	head	head
On farms January 1	:						
Fall crop	:	25.1	30.0	26.3	31.0	38.3	44.0 37.8
Spring crop	:	15.4	21.7	19.4	18.8	22.1	32.6 26.7
Breeding	:	9.5	9.4	8.5	10.6	13.3	11.4 10.9
Total	:	50.0	61.1	54.2	60.4	73.7	88.0 75.4
Pig crop	:						
Spring	:	53.2	49.5	49.4	60.9	74.0	62.0 60.0
Fall	:	33.7	30.3	35.6	43.7	53.0	43.0 40.0
Total	:	86.9	79.8	85.0	104.6	127.0	105.0 100.0
Total supply	:	136.9	140.9	139.2	165.0	200.7	193.0 175.4
Slaughter	:						
Federally inspected	:	41.4	50.4	46.5	53.9	64.6	72.0 62.1
Wholesale	:	7.1	8.9	8.1	6.6	7.1	7.0 5.8
Retail	:	4.1	4.2	4.0	4.9	5.5	7.0 5.7
Farm	:	14.0	14.1	12.8	12.5	16.0	18.0 15.1
Total	:	66.6	77.6	71.4	77.9	93.2	104.0 88.7
Other disappearance	:	9.2	9.1	7.3	13.4	19.5	13.6 13.0
Total disappearance ..	:	75.8	86.7	78.7	91.3	109.7	114.5 96.0
On farms end of year	:	61.1	54.2	60.5	73.7	88.0	75.4 73.7
1/ Preliminary estimates.	:						

On the basis of the assumptions indicated in the table above, a slaughter of 104 million head of hogs can be obtained in 1944 and 88.7 million head in 1945. Assuming a yield of 130 pounds of pork and 50 pounds of lard per hog, a slaughter of 104 million hogs (in 1944) would yield 13,520 million pounds of pork and 5,200 million pounds of lard. A slaughter of 88.7 million hogs (in 1945) would yield 11,531 million pounds of pork and 4,435 million pounds of lard.

Production Goal for 1944

National Goal

The production capacity for pork and lard is slightly above the total minimum requirements of 13,490 million pounds of pork and 3,099 million pounds of lard that will have to be met from 1944 production. Stocks at the beginning of the year probably will be 1,300 million pounds of pork and 150 million pounds of lard. It is suggested, therefore, that the goal for hogs

be the same as the estimated 1944 production capacity--10.2 million sows for farrowing in the spring and 7 million sows for farrowing in the fall which would be equivalent to 62 million spring pigs and 43 million fall pigs. It is also suggested that the goal for the average weight of hogs slaughtered in 1944 be 230 pounds.

Distribution of the Goal by States

The national goal for the number of sows to farrow in the spring and in the fall of 1944 would continue about the same relationship between the spring and fall pig crops as existed in 1943. In the suggested distribution of the national goals among the States, as indicated in the accompanying table, the committee has been guided largely by the reports of the State Committees on wartime production capacity.

The decrease in production capacity for hogs will be greatest in (1) some of the wheat States, (2) the general farming areas that border the Corn Belt, and (3) the Northeastern States and Lake States where hog production competes with specialized dairy and poultry production. The production of hogs in the central Corn Belt can be maintained at relatively high levels because of the reserve capacity for an additional acreage of corn in 1944. Hog production in Nebraska and South Dakota is still recovering from the effects of the drought in 1934.

In the suggested distribution of number of sows to farrow among the States, it is assumed that the pigs farrowed will be marketed from each State at an average weight which would bear the normal relationship to the average weight for all hogs marketed in the United States.

Factors Influencing Achievement of Goals and Recommendations

Feed Supplies

With the 1943 corn crop now estimated at about 2.9 billion bushels, the restricting effect of short feed supplies upon livestock production in 1944 is less critical than seemed likely at the beginning of the growing season when conditions were unusually adverse. Supplies of wheat and rye available for feed also may be greater than previously has been indicated. But even with these additional supplies and with the acreages of feed grains pushed upward to maximum capacity, it will be necessary to conserve feed in all possible ways to insure attainment of each of the 1944 livestock production goals.

During the 1942-43 feeding year the rates of feeding of concentrates per unit of livestock production have been 7.7 percent above the average for the 5-year period 1937-38 to 1941-42. Obviously a considerably larger output of livestock products could be obtained next year from the available feed supplies if this tendency towards excessive use of feed could be overcome. Every possible effort should be made to avoid continuation of this reduction in production efficiency resulting from insufficient care, overcrowding, disease, and inefficient feeding practices. Department agencies, State Agricultural Extension Services, veterinarians, and others in a position to contribute, should cooperate in an educational campaign for livestock sanitation, prevention of disease, and improved feeding practices.

Processing Facilities

With indications that slaughter of all livestock will be up 10 to 15 percent during the last quarter of this year, and hog slaughter at least 25 to 30 percent above the last quarter of 1942, it is apparent that processing capacity will be taxed to the maximum to handle the supply. Lack of skilled labor will be the principal limitation on slaughter capacity, although cold storage space too may be a limiting factor. It is highly probable that in a number of weeks from the end of November to the end of January, hogs will be offered in such volume that the chilling capacity

HOGS: SUGGESTED NUMBER OF SOWS TO FARROW IN 1944 WITH COMPARISONS

State and division	Spring (Dec. 1 to June 1)						
	1937-41	1942	1943	1944	Percentage 1944 goal is of		
				goal 1/	1937-41	1942	1943
	1,000 head	1,000 head	1,000 head	1,000 head	Percent	Percent	Percent
Maine	6	6	8	6	100	100	75
N. H.	2	2	3	2	100	100	75
Vt.	3	3	4	3	100	100	75
Mass.	14	13	15	14	100	108	93
R. I.	1	1	1	1	75	75	75
Conn.	2	3	4	3	150	100	75
N. Y.	28	30	45	34	121	113	76
N. J.	13	14	19	14	108	100	74
Pa.	69	72	98	74	107	103	76
N. E.	138	144	197	151	109	105	77
Ohio	385	459	551	460	119	100	83
Ind.	499	595	690	600	120	101	87
Ill.	719	912	1,094	975	136	107	89
Mich.	115	139	188	140	122	101	74
Wis.	296	362	427	360	122	99	84
Minn.	642	842	1,019	910	142	108	89
Iowa	1,594	2,028	2,454	2,225	140	110	91
Mo.	376	531	664	540	144	102	81
S. Dak.	225	334	461	461	205	138	100
Nebr.	326	494	766	650	199	132	85
N. Cent.	5,177	6,696	8,314	7,321	141	109	88
Del.	3	4	4	3	100	75	75
Md.	25	28	36	29	116	104	81
Va.	75	90	117	96	128	107	82
W. Va.	23	22	29	22	96	100	76
N. C.	113	131	159	115	102	88	72
Ky.	138	190	228	142	103	75	62
Tenn.	139	185	231	146	105	79	63
E. Cent.	516	650	804	553	107	85	69
S. C.	67	73	88	80	119	110	91
Ga.	187	196	245	205	110	105	84
Fla.	82	90	115	105	128	117	91
Ala.	117	127	165	115	98	91	70
Miss.	105	114	146	110	105	96	75
Ark.	136	148	192	154	113	104	80
La.	126	116	142	113	90	97	80
Okla.	112	163	220	126	112	77	57
Tex.	197	270	364	310	157	115	85
South	1,129	1,297	1,677	1,518	117	102	79
N. Dak.	99	138	250	225	227	120	90
Kans.	154	269	379	226	147	84	60
Mont.	22	41	69	55	250	134	80
Idaho	54	73	80	68	126	93	85
Wy.	10	15	20	18	180	120	90
Colo.	37	67	95	66	178	99	69
N. Mex.	10	13	17	13	130	100	76
Ariz.	5	7	9	7	140	100	78
Utah	14	20	28	21	150	105	75
Nev.	3	4	4	3	100	75	75
Wash.	35	44	55	47	134	107	85
Oreg.	37	43	46	41	111	95	89
Calif.	85	86	96	86	101	100	90
West	565	870	1,148	876	155	101	76
U. S.	7,525	9,657	12,140	10,219	136	106	84

1/ Computed by multiplying number of sows farrowed in 1943 by the desired percentage change in 1944 from 1943.

HOGS: SUGGESTED NUMBER OF SOWS TO FARROW IN 1944 WITH COMPARISONS

State and division	Fall (June 1 to Dec. 1)						
	1937-41	1942	1943 1/	1944	Percentage 1944 goal is of		
	1,000 head	1,000 head	1,000 head	1,000 head	1937-41:	1942 :	1943
					Percent	Percent	Percent
Maine	5	6	8	6	120	100	75
N. H.	1	2	3	2	200	100	67
Vt.	3	3	5	4	133	133	75
Mass.	11	11	14	11	100	100	79
R. I.	1	1	1	1	75	75	75
Conn.	2	3	4	3	150	100	75
N. Y.	22	30	56	42	191	140	75
N. J.	9	12	17	12	133	100	71
Pa.	71	85	128	90	127	106	70
N. E.	125	153	236	171	137	112	72
Ohio	341	432	527	440	129	102	83
Ind.	432	561	668	575	133	102	86
Ill.	449	558	803	750	167	114	93
Mich.	94	129	200	120	128	93	60
Wis.	154	214	278	200	130	93	72
Minn.	220	328	400	350	109	107	88
Iowa	583	910	1,046	1,025	176	113	98
Mo.	346	534	635	480	139	90	76
S. Dak.	47	83	123	123	262	148	100
Nebr.	130	264	335	320	246	121	96
N. Cent.	2,796	4,113	5,015	4,383	157	107	87
Del.	4	4	6	4	100	100	67
Md.	27	32	43	34	126	106	79
Va.	74	96	130	102	138	106	78
W. Va.	24	30	40	30	125	100	75
N. C.	94	120	152	106	113	88	70
Ky.	127	190	239	143	113	75	60
Tenn.	126	178	214	143	113	80	67
E. Cent.	476	650	824	562	118	86	68
S. C.	60	69	86	78	130	113	91
Ga.	156	190	243	215	138	113	88
Fla.	67	73	95	86	128	118	91
Ala.	103	127	178	125	121	98	70
Miss.	89	107	141	108	121	101	77
Ark.	116	142	178	142	122	100	80
La.	103	97	121	96	93	99	79
Okla.	111	174	230	143	129	82	62
Tex.	189	269	328	304	161	113	93
South	994	1,248	1,600	1,297	130	104	81
N. Dak.	16	31	48	43	269	139	90
Kans.	137	266	340	224	164	84	66
Mont.	16	31	50	30	188	97	60
Idaho	40	54	60	48	120	89	80
Wyo	8	13	17	13	162	100	76
Colo.	30	60	80	48	160	80	60
N. Mex.	10	14	15	12	120	86	80
Ariz.	4	7	9	7	175	100	78
Utah	10	18	27	18	180	100	67
Nev.	2	2	2	2	100	100	100
Wash.	26	38	48	38	146	100	79
Oreg.	25	31	38	30	120	97	79
Calif.	83	96	106	95	114	99	90
West	407	661	840	608	149	92	72
U. S.	4,798	6,825	8,515	7,021	146	103	82

1/ Number indicated to farrow from breeding intentions reports.

2/ Computed by multiplying number of sows farrowed in 1943 by the desired percentage change in 1944 from 1943.

of inspected plants, as well as cold storage facilities, will not be sufficient to handle them. Farmers should be encouraged to market early spring pigs as soon as they have reached market condition in order to reduce the burden of processing facilities when later pigs will be coming to market in large numbers. Early marketing at medium weights will also conserve feed supplies for other classes of livestock and for use later when feed supplies will be even more badly needed for the production of livestock products for meeting wartime needs.

If the run of hogs becomes excessive for transportation and processing facilities during December and January, a plan for the regulation of marketings has been developed and can be inaugurated so as to relieve the congestion.

Price Relationships

Marketing of hogs at lighter weights will be encouraged by prospective shortages of feed supplies. It is doubtful, however, that the feed supply situation alone can be expected to influence the market weight of hogs as much as is needed during the heavy movement in the winter and spring of 1943-44. The problem of getting hogs marketed at lighter weights is largely a matter of the hog-corn price ratio and differentials in the prices of hogs of different weights. In early summer heavy hogs were selling for about the same price per pound as light hogs, but more recently they have been somewhat lower. The Department in buying hog products for Government account could give preferential support to the prices of hogs of the lighter weights by accepting offers of pork cuts from light hogs at prices relatively higher than those for heavy cuts.

The problem of curtailment of hog production to the goal for a pig crop of 105 million head, which is 17 percent less than the 1943 pig crop, is also directly related to the hog-corn price ratio. The pig crops have progressively increased since the fall of 1941 under a ratio that has been extremely favorable to hog producers. This ratio at times has been as high as 16 or 17 to 1 as compared with a long-time average of 11.4. Current price ceilings on pork products and corn and the strong demand for all meats have tended to maintain a very favorable central market ratio. In recent weeks, however, the effective ratio between the farm prices of corn and hogs has declined for many hog producers. This situation, together with the shortage of feed, is encouraging many farmers to plan some curtailment in their breeding operations this fall. The present situation with respect to the marketing of corn and the price at which it sells at the farm tend to disorganize feeding operations throughout the country and contribute to much uncertainty as to what hog producers can expect.

Hog production is moderately profitable with a hog-corn price ratio of 11.5 to 1. This ratio probably could be expected to stabilize hog production at about the 1942 level when combined with the present policy of forward Government support of the price of hogs. It would seem desirable, therefore, for the Department to recommend an advance in the ceiling price of corn from \$1.07 to \$1.15-\$1.25 per bushel. This action would contribute to a downward adjustment in hog production and bring more corn and other feed grains to market, thus making it available for the production of dairy and poultry products so greatly needed. It is also recommended that the Department announce a definite price support policy as early as possible (before breeding operations start this fall) for hogs to be marketed from the 1944 spring pig crop. It is thought that the present level of price support might be continued beyond September 1944 if the ceiling price for corn is raised as suggested.

Price Data for 1944 With Comparisons

A. Historical and Present Prices Per Unit 100 pounds.

(1) January 1935 - December 1939 average	\$	8.38
(2) 1941 average	\$	9.14
(3) 1942 average	\$	13.13
(4) July 1943 average	\$	13.20

B. Price Ceiling Provisions

(1) Parity or comparable price July 1943	\$	12.00
(2)*Highest price January 1 - September 15, 1942	\$	14.10
(3) Price ceiling July 1943	1/	\$14.00-14.25

C. Price Support Provisions

(1) Present support price	2/	\$13.00-13.25
(2) Present additional inducements	\$	
(3) Total gross returns	\$	
(4) 90 percent of parity	\$	10.80

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1) July 1943 Index Price of Commodity		
Base 1909-14		182
(2) July 1943 Index Price of Commodity		
Base 1935-39		158
(3) July 1943 Index Commodities Used in Production		
Base 1909-14		164
(4) July 1943 Index Commodities Used in Production		
Base 1935-39		129
(5) *July 1943 Index of Farm Wages		
Base 1935-39		225
(6) Unit returns to equal return from competing crops		

E. Suggested 1944 Price

(1) Suggested average price to farmers	3/	\$	13.25
(2) Suggested inducements (average value per unit)		\$	
(3) Total suggested return per unit		\$	

1/ Estimated farm price derived from announced ceiling price of \$14.75 per cwt. at Chicago.

2/ Estimated farm price derived from announced support price of \$13.75 per cwt. at Chicago.

3/ Price of hogs should be approximately 11 times the price of corn.

* Seasonally adjusted.

BEEF AND VEAL

Summary

The suggested 1944 production goal for beef and veal is a total slaughter of 33.7 million cattle and calves. The estimated yield of beef and veal from this number of cattle and calves is 11,824 million pounds. A total slaughter of 33.7 million cattle and calves appears to be about the highest production of beef and veal feasible in 1944. This total would include approximately 22.3 million cattle and 11.4 million calves. If attained, this slaughter would check the expansion in cattle numbers that has been in progress since 1938 and would bring numbers back to the level reached at the beginning of 1943. Some downward readjustment in cattle numbers appears highly desirable now in order to bring total livestock numbers in better balance with the Nation's feed and pasture resources. The increased need for dairy products during the war emergency will require a further increase in milk cows to obtain the desired output of these products. With reasonable prospects that the number of dairy heifers and heifer calves held back in 1943 will assure the suggested number of milk cows, - 28.2 million head, - by January 1, 1945, it is suggested that a smaller than usual proportion of these young dairy animals be retained in 1944 and that total numbers of young dairy cattle at the end of that year be about 1.6 million head less than at the beginning. The remaining reduction in cattle numbers in 1944 would be in cattle kept primarily for beef.

The production goal for slaughter is about 8 percent above the estimated total minimum requirements for beef and veal for all purposes but if reached will provide beef supplies for civilians about comparable with average pre-war consumption. In view of the greatly increased purchasing power of civilians and the increased demand for all meats, conditions are now unusually favorable for cattlemen to effect a reduction in cattle numbers through the marketing of larger than usual supplies.

If 22.3 million cattle are slaughtered, the total production of beef would be about 10.6 billion pounds. A slaughter of 11.4 million calves would yield about 1.2 billion pounds of veal. These totals exceed the record production of 1942 by 1.9 billion pounds, or 22 percent, for beef and 124 million pounds, or 11 percent, for veal.

Requirements for 1944

The total minimum requirements for beef and veal for all purposes in 1944 are estimated to be 10,994 million pounds. These requirements are 896 million pounds, or 9 percent, larger than the supply expected to be available in 1943. Non-civilian requirements (military and lend-lease) are 1,230 million pounds more than 1943. Minimum supplies for civilians are estimated at 7,179 million pounds which is equivalent to 56 pounds per capita as compared with the average of 63.1 pounds consumed in the 5-year period 1935-39. A reserve of 600 million pounds has been indicated for unforeseen emergencies. If the slaughter goals recommended are attained, this would provide an additional 830 million pounds of beef and veal, most of which probably would be available for civilian use and would increase the per capita allowance for civilians by slightly more than 6 pounds, and bring the total almost to the 1935-39 level.

Problems in Attaining Goals

Favorable range and feed conditions in the last 5 years have enabled cattle producers to increase cattle numbers above the peak levels reached at the time of the 1934 drought. Numbers again appear to be excessive in relation to normal range carrying capacity and feed supplies. High returns for calves in the last 2 years have tended to encourage the holding of cows and heifers which might otherwise have been sold for slaughter. The increase in income tax rates following the rise in cattle prices also tends to restrict the sale of breeding stock. The relatively greater advance in prices of feeder cattle as compared with that in prices of slaughter cattle has greatly reduced the feeder margin, thus discouraging cattle feeding and decreasing the number of fed cattle for

slaughter. If supplies of cattle for slaughter in 1944 are to be uniformly available throughout the year, some encouragement for increased feeding seems desirable.

Recommendations

Three general lines of approach are suggested as action to be taken to attain the goals recommended. These are

1. An educational campaign stressing the need for increased supplies of beef and veal for the armed forces and civilians and emphasizing the desirability of taking advantage of the present strong demand and high prices for marketing cattle in larger than usual numbers and placing the cattle industry in a stronger position to meet eventual price declines and adverse feed conditions.

2. Endeavor to work out a program which will assure cattle finishers an adequate margin on feeding operations so as to encourage the feeding of as large a number of cattle as feed conditions warrant and as seem necessary to provide the supplies of beef required, particularly during the period December to July. This problem probably is the most difficult of all those involved in attaining the goals recommended.

3. Attempt to develop a program which would provide special incentives for greater culling and marketing of beef breeding stock and unneeded dairy stock, so as to bring total numbers of cattle more nearly in balance with feed supplies and range carrying capacity.

The Situation in 1943

Supplies and Utilization

Cattle numbers on January 1, 1943, were estimated at 78.2 million head, or about 3 million more than a year earlier, notwithstanding an increase in combined slaughter of cattle and calves in 1942 of 1.4 million head. About one-third of the total increase was in cattle kept for milk. The greatest relative increase, therefore, was in cattle produced primarily for beef. The increase in all cows and heifers, 2 years old and over, dairy and beef, totaled 1.1 million head and the increase in calves on hand over a year earlier was 1 million head.

The number of cattle on farms at the beginning of 1943 exceeded all previous records and was 3.8 million head larger than the peak numbers of 1934. The proportional distribution of cattle by regions this year, however, was somewhat different from that in 1934 as most of the increase since that year has occurred in the North Central States east of the Missouri River, the three Pacific Coast States, the Middle Atlantic States and the South. Most of the Great Plains and Rocky Mountain area had fewer cattle this year than in 1934.

The number of cattle on feed at the beginning of this year also was of record proportions, the increase in the Corn Belt States over January 1, 1942, amounting to 8 percent. Increases also were reported in several other States but fewer cattle were on feed in all of the 11 Western States except California.

Notwithstanding the increase in total cattle numbers and the increased number on feed at the beginning of the year, the slaughter of cattle under Federal inspection thus far in 1943 has been considerably under that in the corresponding period of 1942, the decrease for the first 7 months amounting to 923,000 head or 15 percent in plants reporting for both periods. Calf slaughter also has been much less than in the previous year, showing a decrease of 980,000 head, or slightly more than 30 percent in comparable plants.

The decrease in cattle marketings this year has been much less than that in federally inspected slaughter. Much of the decrease in the latter apparently has resulted from an increased proportion of the available supplies going into other slaughter channels notwithstanding restriction orders designed to limit non-inspected slaughter. Receipts of cattle at the 68 public stockyard markets during the first 6 months of 1943 were only slightly less than a year earlier, being down 264,000 head or 3.5 percent. Receipts of calves, however, were down 628,000 head or 22 percent. In July receipts of both cattle and calves were considerably below the large receipts in that month last year.

The number of cattle sold at public stockyards for local slaughter and for shipment to other points (mostly for slaughter) during the first 6 months was 484,000 less than in the corresponding period of 1942, whereas purchases of cattle at public stockyards by federally inspected plants were 873,000 less. Uninspected slaughterers apparently bought 389,000 more cattle and 82,000 more calves at public markets than in the first half of last year.

Other evidence that market supplies of cattle this year have been only slightly less than a year earlier, even though federally inspected slaughter was greatly reduced, is shown in the number of steers sold at Chicago for slaughter. Supplies of these steers during the January-July period were down only 27,000 head, or about 4.4 percent.

The diversion of an increased proportion of the slaughter supplies of cattle and calves into uninspected slaughter channels makes it difficult to estimate with reasonable accuracy the approximate volume of total slaughter this year. It appears, however, that the combined total slaughter of cattle and calves thus far this year probably has not been greatly different from that of a year earlier. Slaughter during the rest of the year is expected to exceed that in the corresponding period of 1942 and the total for the year is tentatively estimated to reach 28.3 million head compared with the 1942 total of 27.1 million. Production of beef from this slaughter is expected to be about 9 billion pounds, or 325 million pounds more than in 1942, and that of veal slightly more than 1 billion pounds, or about 62 million pounds less than the total of last year. In 1942, cattle slaughter dropped off more than usual in the last quarter of the year. This year, it is anticipated that slaughter in the last quarter will be a larger than usual proportion of the yearly total.

If slaughter in 1943 should be about as indicated, cattle numbers at the beginning of 1944 are expected to total about 80.8 million head or about 2.5 million more than on January 1, 1943.

Requirements in 1944

The total minimum requirements for beef and veal for all purposes in 1944 are estimated to be 11,288 million pounds. These requirements are about 1,051 million pounds, or 10 percent, more than the supply expected to be available in 1943. Non-civilian requirements (military and lend-lease), totaling 3,282 million pounds, are 1,297 million pounds more than in 1943. Supplies for civilians are estimated at 7,179 million pounds. This is equivalent to 56 pounds per capita as compared with the average of 63.1 pounds consumed in the 5-year period 1935-39. Needed reserve stocks for unforeseen emergencies are placed at 600 million pounds.

Supplies for 1944

Prospective Stocks and Imports

Stocks of beef at the beginning of 1944 are estimated at 225 million pounds, or about the same amount as probably will be carried into 1945. Imports if any will be no greater than in other recent years and are not expected to exceed 200 million pounds. Practically all of the 1944 requirements, therefore, will have to come from domestic production. Assuming average dressed weights of 475 pounds for cattle and 108 pounds for calves, it will be necessary to slaughter 20,886,000 cattle and 10,555,000 calves to meet the indicated requirements. The average of 475 pounds for cattle is 12 pounds lighter than the indicated average for 1943 but is suggested because of the expectation that 1944 marketings probably will include a larger proportion of cows and range stock and a smaller proportion of grain-fed cattle than in 1943. Dressed weights of calves are the same as those indicated for 1943.

The number of cattle and calves necessary for slaughter to meet the beef and veal requirements shown exceed the estimated slaughter for 1943 by 2,286,000 for cattle and 855,000 for calves, or a total of 3,141,000 head.

Production Capacity in 1944

A total slaughter of 31.4 million cattle and calves in 1944 to meet the requirements indicated for beef and veal would leave cattle numbers at the end of the year at about 80.5 million head, or about unchanged from the number now indicated as likely to be on hand at the end of 1943. This number appears to be excessive in relation to the carrying capacity of ranges and pastures, and to the production of harvested forage, consequently some reduction in numbers seems desirable. This reduction can be obtained only by increasing the slaughter of cattle and calves so that the total of slaughter and death losses combined exceeds the number of calves born plus imports of cattle. A decrease in 1944 sufficient to bring numbers on January 1, 1945 to about the level reached at the beginning of 1943 appears to be about the maximum reduction that would be reasonably obtained in view of the present situation with respect to feed and range conditions, the cattle price level, and the relationship of the prices of calves to the prices of cows. To effect such a reduction in numbers by the end of 1944, it would be necessary to slaughter nearly 34 million cattle and calves in the coming year or about 5.4 million more than the indicated slaughter for 1943.

Production Goals for 1944

National Goals

Since cattle numbers and other livestock are now at levels where they tend to be excessive in relation to the feed and pasture resources of the country it is recommended that the slaughter goal for cattle and calves in 1944 be set high enough to bring about a moderate reduction in numbers by the end of the year. A goal of 22.3 million cattle and 11.4 million calves is suggested as feasible and desirable. A slaughter of this volume would yield approximately 10.6 billion pounds of beef and 1.2 billion pounds of veal. This production would exceed the minimum requirements for beef and veal indicated for 1944 by about 8 percent and provide an additional amount for civilians of about 6 pounds per capita, thereby making the total allowance for this group almost equal to the 5-year (1935-39) average consumption of 63.1 pounds. The beef output would exceed the record production of 1942 by 1.9 billion pounds, or 22 percent, and that of veal would be up 124 million pounds, or 11 percent.

A slaughter as large as indicated would leave cattle numbers at the beginning of 1945 at approximately 78.2 million head, or at the same level as at the start of 1943, and 13 million more than the last low point in numbers established at the beginning of 1938.

Distribution of the Goals by Kinds
of Cattle and by States

The increased need for dairy products during the war emergency will require a further increase in milk cows to obtain the desired output of these products. With reasonable prospects that the number of dairy heifers and heifer calves held back in 1943 will assure the suggested number of milk cows, - 28.2 million head, - by January 1, 1945, it is suggested that a smaller than usual proportion of these young dairy animals be retained in 1944 and the total numbers of young dairy cattle at the end of that year be about 1.6 million head less than at the beginning. The remaining reduction in cattle numbers in 1944 would be in cattle kept primarily for beef. These are expected to total about 39.7 million head at the beginning of the year, making the grand total of all cattle about 80.8 million head. If total cattle numbers are reduced to 78.2 million head at the beginning of 1945, and young dairy cattle are reduced by about 1.6 million head, the number of other cattle would be reduced 1,700,000 head. The suggested reduction in these cattle would be about as follows:

Beef cows	600,000
Heifers, 1-2 years	200,000
Steers	400,000
Bulls	100,000
Calves	400,000
Total	1,700,000

The balance sheet of numbers, production, and slaughter for 1939-43 and as proposed for 1944 is shown in the table on the following page.

Almost all States are expected to have more cattle on hand at the beginning of 1944 than a year earlier. Those most likely to show reductions, primarily because of adverse feed and range conditions in 1943, are Arizona, New Mexico, Arkansas, Utah, Idaho, Washington, and Oklahoma. Kansas also may have fewer cattle because it has been heavily stocked the past spring and summer and may find it necessary to reduce numbers somewhat. Reductions in these States, however, will not occur unless marketings are greatly increased this fall over those of previous years. The table on page 20 shows the distribution of all cattle by States in 1943 and the indicated distribution in 1944 and 1945 as suggested for attaining the goals recommended. The table on page 21 shows a similar distribution for beef cows.

Since the greater part of the cattle kept for beef, especially the breeding stock, are in the Great Plains and western range States, most of the reduction in beef cattle numbers that might occur would obviously take place in those States. In most of these States numbers are now near the maximum carrying capacity, even under favorable conditions, and some reduction appears desirable in order to provide a reasonable margin of safety in the event of a recurrence of drought conditions. The proposed reduction in numbers in 1944 indicated for the goals would result in a decrease of slightly more than 1 million head in the western range States, including Texas, Oklahoma, Kansas, and North Dakota. In the North Central States where a large proportion of the dairy cattle are located numbers also would be reduced about 1 million head. In those States south of the Ohio and Potomac Rivers and east of Texas and Oklahoma the reduction would be about 430,000. The total for all States would be about 2,600,000.

Cattle and calves: Feasible number on farms January 1, imports, calf crop, and slaughter, 1944 and 1945, with comparisons

Item	Feasible						
	1939	1940	1941	1942	1943	1944	1945
	1/						
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
	head	head	head	head	head	head	head
Cattle and calves on farms Jan. 1 :							
Milk animals :							
Cows 2 years old and over:	24.6	24.9	25.5	26.4	26.9	27.6	28.2
Heifers 1-2 years	5.1	5.5	5.7	5.8	5.9	6.1	6.5
Heifer calves	5.9	6.0	6.2	6.6	6.9	7.3	7.5
Total milk stock	35.6	36.4	37.4	38.8	39.8	41.0	42.2
Other cattle :							
Cows 2 years old and over:	10.0	10.6	11.2	12.1	12.7	12.5	11.9
Heifers 1-2 years	3.1	3.4	3.8	4.0	4.3	4.6	4.0
Steers 1 year and over	5.2	5.3	5.9	6.4	6.8	7.1	6.0
Bulls 1 year and over	1.6	1.6	1.7	1.7	1.8	2.0	1.7
Other calves	10.6	10.9	11.5	12.2	12.9	13.6	12.4
Total other cattle (beef) ..:	30.4	31.8	34.1	36.4	38.4	39.8	36.0
Grand total all cattle:	66.0	68.2	71.5	75.2	78.2	80.8	78.2
Calf crop	28.8	29.8	31.0	32.7	33.7	34.0	
Imports of cattle and calves .....	.8	.6	.7	.7	.5	.5	
Total number	95.6	98.6	103.2	108.6	112.4	115.3	
Slaughter :							
Cattle - Federally inspected ...:	9.4	9.8	10.9	12.3	11.4	14.3	
Non-inspected	5.2	5.2	5.5	5.4	7.2	8.0	
Total	14.6	15.0	16.4	17.7	18.6	22.3	
Calves - Federally inspected ...:	5.3	5.4	5.5	5.8	4.5	5.6	
Non-inspected	3.9	3.7	3.8	3.6	5.2	5.8	
Total	9.2	9.1	9.3	9.4	9.7	11.4	
Total slaughter	23.8	24.1	25.7	27.1	28.3	33.7	
Other disappearance	3.6	3.0	2.3	3.3	3.3	3.4	
Total disappearance	27.4	27.1	28.0	30.4	31.6	37.1	
Number end of year	68.2	71.5	75.2	78.2	80.8	78.2	

1/ Preliminary estimates.

Prospective Problems of Attaining 1944 Goals

Range and pasture conditions have been good to excellent in most of the western range States during the last 5 years, making it possible for these States to increase cattle numbers following the sharp reductions necessitated by the droughts of 1934 and 1936. To a considerable extent these favorable conditions have tended to develop a spirit of optimism among many producers as to the number of livestock that can be safely carried in that area, considering the possibilities of a recurrence of the drought conditions that have been experienced there at various times in the past. In some of these States, cattle numbers now are above the 1934 levels and in most of the others they are only slightly below those levels.

High returns for calves in the last 2 years are one of the factors which has tended to encourage the expansion of beef breeding herds and to discourage the sale of cows and heifers for slaughter. Likewise, the strong demand for dairy products has contributed to a further increase in milk cattle.

**CATTLE AND CALVES: SUGGESTED TOTAL NUMBER ON FARMS JANUARY 1, 1945,
WITH COMPARISONS**

State and division	: 1937-41 : 1,000 head	: 1943 : 1,000 head	: 1944 1/ : 1,000 head	: 1945 goal 2/ : 1,000 head	: Percentage 1945 goal is of 1937-41 : Percent	: 1943 : Percent	: 1944 : Percent
Maine	231	214	222	218	94	102	98
N. H.	124	115	120	118	95	103	98
Vt.	433	433	448	437	100	101	98
Mass.	196	193	202	201	103	104	100
R. I.	29	29	30	29	100	100	97
Conn.	176	178	186	184	105	103	99
N. Y.	2,059	2,142	2,183	2,128	103	99	97
N. J.	193	213	216	212	107	100	93
Pa.	1,475	1,560	1,593	1,543	105	99	97
N. E.	4,926	5,077	5,210	5,070	103	100	97
Ohio	1,995	2,196	2,284	2,213	111	101	97
Ind.	1,627	1,858	1,927	1,858	114	100	96
Ill.	2,781	3,212	3,308	3,178	114	99	96
Mich.	1,686	1,902	1,988	1,928	114	101	97
Wis.	3,381	3,794	3,945	3,883	115	102	98
Minn.	3,356	3,753	3,887	3,793	113	101	98
Iowa	4,632	5,422	5,603	5,409	117	100	97
Mo.	2,542	3,228	3,391	3,305	130	102	97
S. Dak.	1,580	2,133	2,223	2,126	135	100	96
Nebr.	2,923	3,596	3,723	3,587	123	100	96
N. Cent.	26,503	31,099	32,279	31,230	113	101	97
Del.	52	58	54	58	112	100	107
Md.	322	355	367	344	107	97	94
Va.	876	998	1,034	1,000	114	100	97
W. Va.	569	604	627	614	108	102	98
N. C.	599	676	719	715	119	106	99
Ky.	1,196	1,396	1,460	1,420	119	102	97
Tenn.	1,162	1,388	1,461	1,406	121	101	96
E. Cent.	4,776	5,475	5,722	5,557	116	101	97
S. C.	335	366	384	382	114	104	99
Ga.	937	1,051	1,096	1,052	112	100	96
Fla.	830	1,042	1,095	1,050	127	101	96
Ala.	935	1,140	1,191	1,153	117	101	97
Miss.	1,232	1,404	1,450	1,389	108	99	96
Ark.	1,100	1,342	1,374	1,312	119	98	95
La.	1,153	1,265	1,346	1,333	115	105	99
Okla.	2,306	3,067	3,140	3,031	131	99	97
Tex.	7,145	7,518	7,723	7,515	105	100	97
South	16,073	18,195	18,799	18,217	113	100	97
N. Dak.	1,256	1,714	1,780	1,730	138	101	97
Kans.	2,760	3,889	4,005	3,843	139	99	96
Mont.	1,053	1,436	1,540	1,479	140	100	96
Idaho	743	882	913	886	119	100	97
Wyo.	813	947	976	943	116	100	97
Colo.	1,436	1,649	1,702	1,636	114	99	96
N. Mex.	1,273	1,314	1,308	1,248	98	95	95
Ariz.	903	911	920	900	100	99	98
Utah	436	472	490	478	110	101	98
Nev.	374	406	411	393	105	97	96
Wash.	737	990	1,012	960	122	97	95
Oreg.	936	1,127	1,141	1,085	116	96	95
Calif.	2,345	2,537	2,592	2,490	106	98	96
West	15,120	18,324	18,790	18,071	120	99	96
U. S.	67,403	78,170	80,800	78,195	116	100	97

1/ Preliminary indications on September 1, 1943 prepared by BAE from State Reports on wartime production capacity and from other data.

2/ Estimated number that would be on farms January 1, 1945 if the 1944 marketings and farm slaughter goal is achieved.

CATTLE AND CALVES: SUGGESTED NUMBER OF BEEF COWS ON FARMS JANUARY 1, 1945

WITH COMPARISONS

State and division	1937-41	1943	1944 1/	1945 goal 2/	Percentage 1945 goal is of		
					1937-41	1943	1944
Maine	5	5	5	5	100	100	100
N. H.	1	1	1	1	100	100	100
Vt.	2	2	2	2	100	100	100
Mass.	1	1	1	1	100	100	100
R. I.	---	---	---	---	---	---	---
Conn.	1	1	1	1	100	100	100
N. Y.	7	7	7	7	100	100	100
N. J.	1	1	1	1	100	100	100
Pa.	13	13	14	12	92	92	86
N. E.	31	31	32	30	97	97	94
Ohio	62	88	89	85	137	97	96
Ind.	109	160	155	145	133	91	94
Ill.	178	260	250	240	135	92	96
Mich.	30	38	38	35	117	92	92
Wis.	18	23	23	22	122	96	96
Minn.	100	119	121	114	114	96	94
Iowa	430	555	550	525	122	95	95
Mo.	388	571	575	540	139	95	94
S. Dak.	254	408	425	400	157	98	94
Nebr.	673	716	700	685	102	96	98
N. Cent.	2,242	2,933	2,926	2,791	124	95	95
Del.	1	2	2	2	200	100	100
Md.	8	11	11	10	125	91	91
Va.	47	77	80	75	160	97	94
W. Va.	40	57	58	56	140	98	96
N. C.	22	34	36	35	159	103	97
Ky.	75	109	110	103	137	94	94
Tenn.	84	128	130	123	146	96	95
E. Cent.	277	418	427	404	146	97	95
S. C.	21	26	27	26	124	100	96
Ga.	127	162	165	150	118	93	91
Fla.	324	444	470	454	140	102	97
Ala.	117	163	165	164	140	101	99
Miss.	158	191	185	160	101	84	86
Ark.	114	173	160	150	132	87	94
La.	306	342	350	360	118	105	103
Okla.	415	625	575	525	126	84	91
Tex.	2,324	2,310	2,280	2,220	96	96	97
South	3,906	4,436	4,377	4,209	108	95	96
N. Dak.	110	190	195	180	164	95	92
Kans.	487	696	650	595	122	85	92
Mont.	360	528	528	500	139	95	95
Idaho	129	147	140	135	105	96	96
Wyo.	338	390	390	375	111	96	96
Colo.	454	528	525	505	111	96	96
N. Mex.	693	682	640	600	87	88	94
Ariz.	470	437	415	415	88	95	100
Utah	111	120	118	115	104	96	97
Nev.	152	171	165	155	102	91	94
Wash.	76	129	125	115	151	89	92
Oreg.	213	293	275	260	122	89	95
Calif.	485	538	538	515	106	96	96
West	4,078	4,849	4,704	4,465	109	92	95
U. S.	10,534	12,672	12,466	11,899	113	94	95

1/ Estimated number that would be on farms January 1, 1944 if numbers are adjusted more nearly in line with feed and range conditions, and if marketings and farm slaughter in the fall of 1943 are of the volume necessary to meet current requirements for beef.

2/ Estimated number that would be on farms January 1, 1945 if the 1944 marketings and farm slaughter goal is achieved.

CATTLE AND CALVES: SUGGESTED NUMBER OF MILK COWS AND OTHER MILK CATTLE ON FARMS JANUARY 1, 1945 WITH COMPARISONS

State and division	1943		1944		1945		Percentage 1945 goal is of			
	indications		indications		goal		1943		1944	
	Milk cows	Other dairy cattle 1/	Milk cows	Other dairy cattle 1/	Milk cows	Other dairy cattle 1/	Milk cows	Other dairy cattle	Milk cows	Other dairy cattle
	:1,000 :head	1,000 head	1,000 head	1,000 head	1,000 head	1,000 head	Pct.	Pct.	Pct.	Pct.
Maine	: 122	70	126	73	130	64	106	91	103	88
N. H.	: 70	33	72	35	74	31	106	94	103	89
Vt.	: 290	121	296	128	302	113	104	93	102	88
Mass.	: 137	47	142	50	146	45	106	96	102	90
R. I.	: 23	5	24	5	24	4	104	80	100	80
Conn.	: 128	40	133	42	136	37	106	93	102	88
N. Y.	: 1,428	580	1,442	601	1,456	531	102	92	101	88
N. J.	: 154	46	155	47	155	43	101	93	100	91
Pa.	: 906	436	915	452	924	398	102	91	101	88
N. E.	: 3,258	1,378	3,305	1,433	3,347	1,266	103	92	101	88
Ohio	: 1,094	517	1,116	551	1,138	486	104	94	102	88
Ind.	: 800	375	816	402	824	355	103	95	101	89
Ill.	: 1,163	640	1,179	669	1,191	590	102	92	101	88
Mich.	: 1,008	514	1,038	551	1,069	477	106	93	103	87
Wis.	: 2,452	1,021	2,526	1,077	2,602	950	106	93	103	88
Minn.	: 1,845	843	1,882	876	1,938	774	105	92	103	88
Iowa	: 1,544	672	1,559	703	1,575	620	102	92	101	88
Mo.	: 1,052	472	1,105	515	1,160	454	110	96	105	88
S. Dak.	: 540	322	545	341	545	301	101	93	100	88
Nebr.	: 707	366	728	388	728	343	102	94	100	88
N. Cent.	: 12,210	5,742	12,494	6,073	12,770	5,351	105	93	102	88
Del.	: 38	15	34	15	40	13	105	87	113	87
Md.	: 212	86	216	90	218	79	103	92	101	87
Va.	: 451	190	460	197	468	173	104	91	102	88
W. Va.	: 243	96	250	99	258	88	106	92	103	89
N. C.	: 376	154	399	164	423	144	113	94	106	88
Ky.	: 612	222	630	240	643	214	105	96	102	89
Tenn.	: 628	251	653	273	653	241	104	96	100	88
E. Cent.	: 2,560	1,014	2,642	1,078	2,703	952	106	94	102	88
S. C.	: 179	92	186	97	193	86	108	93	104	89
Ga.	: 391	227	407	236	419	208	107	92	103	88
Fla.	: 123	91	124	93	125	81	102	89	101	87
Ala.	: 438	274	450	296	459	260	105	95	102	88
Miss.	: 573	277	584	296	596	261	104	94	102	88
Ark.	: 536	321	547	336	547	296	101	92	100	88
La.	: 338	200	369	217	390	191	111	96	106	88
Okla.	: 903	558	939	589	986	520	110	93	105	88
Tex.	: 1,532	624	1,569	649	1,616	574	106	92	103	88
South	: 5,013	2,664	5,175	2,809	5,331	2,477	106	93	103	88
N. Dak.	: 608	328	620	342	632	293	104	89	102	86
Kans.	: 817	401	842	427	867	378	106	94	103	89
Mont.	: 173	82	180	87	185	77	107	94	103	89
Idaho	: 266	142	279	149	290	131	109	92	104	88
Wyo.	: 70	37	72	37	74	33	106	89	103	89
Colo.	: 246	122	248	132	250	116	102	95	101	88
N. Mex.	: 83	42	87	45	90	40	108	95	103	89
Ariz.	: 51	24	55	26	59	23	116	96	107	88
Utah	: 112	62	118	66	123	57	110	92	104	86
Nev.	: 22	15	22	15	22	13	100	87	100	87
Wash.	: 384	202	388	207	384	182	100	90	99	88
Oreg.	: 287	151	290	156	287	137	100	91	99	88
Calif.	: 786	406	778	423	786	374	100	92	101	88
West	: 3,905	2,014	3,979	2,112	4,049	1,854	104	92	102	88
U. S.	: 26,946	12,812	27,595	13,505	28,200	11,900	105	93	102	88

1/ Heifers 1-2 years and heifer calves kept for milk cows.

Another factor probably tending to restrict the selling of cattle, particularly breeding stock, at recent price levels is the increase in the income tax rate. Most producers make their income tax returns on the basis of money received during the year rather than on an accrual basis which allows for changes in inventory values from year to year. The increase in the income tax rate following the sharp rise in cattle prices places these producers in the position of having to pay out a much larger proportion of their net cash returns for taxes than they would had they been using the accrual method of accounting, consequently they are reluctant to dispose of cattle considered as plant or capital investment.

One of the problems to be considered in connection with attaining the goals for 1944 is that of getting the needed increase in the number of fed cattle so as to have the desired distribution of slaughter supplies through the year.

A slaughter of 22.3 million cattle with the distribution between federally inspected and other slaughter in about the usual proportions prior to 1943 would represent 15 to 15.5 million head under Federal inspection, or about 22 percent more than in 1942. If this slaughter is to be distributed over the year in the normal pattern so as to avoid congestion in processing and distributive facilities and provide beef as needed, it would be necessary to increase the number of cattle fed to be marketed during the first 6 months by at least 20 percent over the maximum number fed in any previous year. The largest number of fed cattle ever marketed in the first half of the year was in 1942 when federally inspected slaughter for the period totaled 5,758,000 head and represented 46.6 percent of the yearly total. A goal of 15 to 15.5 million head for federally inspected slaughter, with 45 percent coming in the first 6 months, would mean from 1 to 1.25 million more cattle than the 1942 record for the period.

If there is to be a large increase in cattle feeding for 1944 slaughter, feeding operations should be planned with a view to marketing the cattle with less weight gain and finish than in previous years, or primarily as medium and good grades rather than as choice and prime. Supplies of concentrate feed and the increased need for such feed for other classes of livestock do not justify the production of highly finished beef under present conditions. Cattle feeding in wartime needs to be planned with a view to making the most effective use of roughage and a minimum amount of concentrates.

During the second 6 months of the year the slaughter supply of cattle includes cattle marketed off of grass, as well as cattle finished on grain. It is during this period that most of the cattle from the range States go to market, the movement taking place largely from mid-August to early December. At this time ranchmen cull their herds of cows no longer suitable for breeding and sell young stock--calves and yearlings--for further finishing, in addition to disposing of any steers on hand suitable for slaughter. The number of steers marketed off of grass now for slaughter, however, comprises a much smaller proportion of the total slaughter supply of cattle as compared with that in the last world war. This is because of radical changes in production methods in the range country, the practice now being to market the bulk of the output as calves and yearlings, most of which go as feeder animals, rather than to produce aged steers.

If federally inspected slaughter in 1944 is to total 15 million head, as suggested, this would necessitate a slaughter in the second half of the year of about 8,250,000 head, or about 1,500,000 more than the maximum for the period yet reached which was in 1918.

During the fall months dairymen also cull their herds of cows they no longer wish to retain, consequently during this period the slaughter supply of cattle comprises a very large proportion of cows. Much of the beef from these cows and from other cattle of the lower grades is now being used for filling Government contracts for canned beef.

Cattle feeders in the spring and early summer of 1943 were much concerned as to the price relationship between feeder cattle and slaughter cattle and the narrow margin between the two classes. From July 1942 to April 1943 the prices of feeder steers at Kansas City rose from \$11.09 to \$14.58, or \$3.49, and those of slaughter steers at Chicago advanced from \$13.63 to \$15.71, or \$2.08. This unequal advance reduced the spread from \$2.54 to \$1.13 and it was further reduced in May to 84 cents. The price spread in the spring months is generally narrower than in the summer and fall, but this year cattle feeders were confronted with the situation that prices of slaughter cattle had risen to levels higher than were warranted by the price ceilings on beef and that no further rise could be reasonably expected. Prices of feeder cattle were being maintained at the highest levels on record by reason of the strong competition from slaughterers for all grades of cattle. Under the circumstances there was little prospect that feeding operations could be carried on with reasonable assurance of not incurring a loss. The result was that fewer feeder cattle were purchased during the late spring than in the corresponding period of 1942 and the number of cattle on feed in the Corn Belt on August 1, was 11 percent less than a year earlier. In July the prices of feeder steers declined \$1.90 from the June level whereas those of slaughter steers dropped only 24 cents, resulting in the spread being wider than in July last year. If cattle feeders could be reasonably sure that prices of slaughter steers will be maintained near present levels they could buy feeder cattle at the July prices and expect a reasonable profit on their feeding operations. Most cattle finishers, however, are fearful of further declines in prices of slaughter cattle, especially if there is more rigid control of price ceilings on beef. This problem of adequate feeder margins is one that needs consideration in working out a program for attaining the 1944 goals.

Transportation

Transportation facilities for livestock will be severely taxed this fall and winter, and it is not improbable that the situation may become critical. The increased transportation load will have to be handled by fewer trucks and with about the same number of railroad stock cars as last year. Loadings in October, the probable peak month, are estimated to be about 12 percent greater than in October 1942. This is the month when cattle and sheep are expected to be moved from western ranges in largest numbers. The peak in hog marketings will come 1 or 2 months later which is definitely advantageous from a transportation point of view. The transportation load in December when hogs are expected to be marketed in largest numbers will also be heavy and it may be as great as that in October.

The relative demand on rail and truck facilities will be somewhat different for the two peak marketing periods. The movement of cattle and sheep from ranges will be mostly to Corn Belt markets, feedlots, and slaughtering plants. This involves long hauls with transportation primarily by rail. The heavy movement of hogs in the fall and winter will be mostly from the Corn Belt to markets, and will represent relatively short hauls with trucks carrying the larger proportion.

Indications are that the demand for rail service in October 1942 approached the capacity of the available equipment. Stock car loadings during October 1943 are expected to be about 6 percent greater than during October 1942. This forecast takes into account differences in marketing and assumes that there will be some shifting from truck to rail. The railroads may be able to handle the increased volume this fall if circumstances are very favorable. If the situation becomes tight, it will necessitate spreading the marketing peak over a period longer than normal. Factors that may contribute to a shortage of rail transportation are the interference with operating schedules and speed by reason of heavy movement of troops and war supplies, the shortage of locomotives and labor to handle the aggregate rail traffic, the excessive demand for transport service for limited periods, and significant shifts from truck to rail transportation. Range producers should place their orders for stock cars as soon as they

are in position to indicate the time of shipment. Those who can ship in September will have greater assurance of having their orders filled than those who will ship in October.

Livestock trucks are estimated to be 15-20 percent less than a year earlier in the Corn Belt region. Similar decreases probably have occurred in other areas. The working capacity of the trucks to handle livestock probably has decreased less than numbers because they are now being used more effectively. Pick-up service is more efficient, cross-hauling has decreased, and trucks as a rule are more fully loaded. Efficient operation of livestock trucks is expected to increase further this fall, largely as a result of voluntary arrangements among farmers and truckers, and organized efforts in local communities. Some shifts from truck to rail are being made. With the increased volume of livestock to be transported, indications are that from now on the truck situation will be progressively more serious.

The prospect is that the supply of refrigerator cars will be ample for the shipment of animal products during the season 1943-44. Currently there is a surplus of packer-owned or controlled refrigerator cars. In order to save locomotive power, the refrigerator cars are being loaded heavier than in ordinary times.

Price Data for 1944 with Comparisons

	<u>Beef cattle</u>	<u>Veal calves</u>
A. Historical and Present Prices Per Unit (100 lb.)		
(1) January 1935 - December 1939 average	\$ 6.56	\$ 7.80
(2) 1941 average	\$ 8.75	\$ 10.35
(3) 1942 average	\$ 10.79	\$ 12.57
(4) July 1943 average	\$ 12.60	\$ 13.90
B. Price Ceiling Provisions		
(1) Parity or comparable price July 1943	\$ 8.94	\$ 11.10
(2)*Highest price January 1-September 15, 1942	\$ 10.95	\$ 12.82
(3) Price ceiling July 1943	1/ \$ 12.00	2/ \$ 13.00-13.25
C. Price Support Provisions		
(1) Present support price	\$ ---	\$ ---
(2) Present additional inducements	\$ ---	\$ ---
(3) Total gross returns	\$ ---	\$ ---
(4) 90 percent of parity	\$ 8.05	\$ 9.99
D. Factors Affecting the 1944 Price Needed to Obtain Goal		
(1) July 1943 Index Price of Commodity		
Base 1909-14	232	206
(2) July 1943 Index Price of Commodity		
Base 1935-39	192	178
(3) July 1943 Index Commodities Used in Production		
Base 1909-14	164	164
(4) July 1943 Index Commodities Used in Production		
Base 1935-39	129	129
(5) *July 1943 Index of Farm Wages		
Base 1935-39	225	225
(6) Unit returns to equal return from competing crops		
E. Suggested 1944 Price		
(1) Suggested average price to farmers	\$11.50-12.00	\$12.00-13.00
(2) Suggested inducements (average value per unit)	\$ ---	\$ ---
(3) Total suggested return per unit	\$ ---	\$ ---

1/ Estimated farm prices derived from ceilings on beef carcasses and whole-sale beef cuts.

2/ Estimated farm prices derived from ceilings on veal carcasses and wholesale veal cuts.

* Seasonally adjusted.

LAMB AND MUTTON

Situation in 1943

The total number of sheep on January 1, 1944 is expected to be about 53 million head which will be 2 million less than the number a year earlier. This number will be smaller than on January 1 of each of the 3 preceding years, but larger than the number in any of the years from 1935 to 1940 inclusive. It would be about one-half million head above the 10-year, 1932-41, average and about 38 million head below the peak numbers on January 1, 1942.

At present there is little to indicate how this 2 million decrease will be separated as between stock sheep and sheep and lambs on feed. Considering present prospects for feed supplies, feed prices and prices of feeder lambs and fat lambs, and prospective winter wheat pastures, it is possible that half of the decrease--1 million head--will be in numbers on feed and the other million in stock sheep. This would bring stock sheep numbers down to about 47 million, which would be below 1942 and 1943 but above any other year since 1934 and a little above the 10-year, 1932-41, average.

This reduction is in close agreement with that indicated by the State reports on Wartime Production Capacity which indicate about 52,600,000 total sheep and about 46,600,000 stock sheep on farms at the beginning of 1944.

The goal for 1944 and 1945 should be to maintain stock sheep numbers at about the level reached at the end of this year. The shortage of labor and of certain supplies adversely affect range sheep production more than that of any other class of livestock. The labor situation in the range areas was characterized this year by a shortage of competent and dependable herders and the high wages paid for herders; the shortage of and general incompetence due to inexperience of labor for lambing; and in some States, by shortage of sheep shearers.

The labor situation was reflected in the drop in the percentage lamb crop in the Western States from 86 in 1942 to 83 in 1943 as weather and feed conditions were not greatly different in the 2 years. The percentage in the Native sheep States was also down about three points, but in these States this was largely a result of weather conditions rather than lack of labor. The 1943 lamb crop of 31,100,000 head was about 1-1/2 million head below the 1942 crop and the smallest since 1939.

Slaughter of sheep and lambs under Federal inspection during the first 8 months of 1943 is expected to be about 13.2 million head, which would be 400,000 head above the previous record for the period in 1942. However, the total this year includes about 600,000 head slaughtered in Fullmer Act plants, where slaughter in 1942 was not in the inspected total. Hence it appears that total slaughter during this period this year was not greatly different from that of last. Beginning with June the percentage of sheep in the total inspected slaughter of sheep and lambs increased rather sharply and in July this percentage was nearly twice as large as in July last year. In these 2 months most of the increased slaughter over last year was in sheep slaughter with little change in the slaughter of lambs and yearlings. This sheep slaughter was almost entirely of ewes and market records and other information indicates that most of these ewes were from Texas.

While a rather heavy slaughter of ewes in the last 4 months of this year is expected, the number will probably be considerably smaller than the record slaughter in the last 4 months of last year. Whether slaughter of lambs during the period will be larger or smaller than last year depends largely upon the number on feed at the end of the year. But with the lamb crop 1-1/2 million head smaller this year than last it hardly seems probable

that the reduction in feeding will be large enough to permit an inspected slaughter of lambs during the last 4 months as large as in 1942, even including slaughter in Fullmer Act plants. Total slaughter of sheep and lambs in 1943 is tentatively estimated at 24.7 million head and other disappearance at 8.5 million and the number remaining on farms and ranches and in feed lots at 52.9 million.

Requirements for 1944

The total requirements for lamb and mutton in 1944 for all purposes is estimated at 965 million pounds. They are about 4 percent of the entire meat requirements. Of the total, 283 million pounds, about one-third, are anticipated non-civilian needs, 667 million civilian needs, and carry-over is estimated at 15 million pounds. These total requirements are about the same as the estimated production in 1943.

Requirements estimated for civilian consumption will provide a per capita consumption of 5.2 pounds. This compares with a per capita consumption of 6.7 pounds in 1935-39 and 7.0 pounds in 1942.

Production Capacity in 1944

Whether sheep numbers can be maintained at about 53 million head of all sheep and about 47 million of stock sheep for the next 2 years is problematical. In the Native sheep States sheep numbers mostly compete with milk cows, and to some extent with other cattle, for available pasture and hay. Since the increase in the acreage of harvested crops is expected to be accompanied by a considerable decrease in the acreage in pasture and hay and since the total of hay and pasture livestock units in these States is relatively large, some reduction in some classes probably will have to be made. As between sheep and milk cows from the point of view of relative returns from pasture and hay and of labor requirements it would seem that sheep have the advantage except in areas where all of the milk solids are used for food. Likewise sheep production requires a relatively small quantity of feed grains and concentrates. Also as compared with stock cattle or beef cattle raising sheep will give larger returns from the same acreage of pasture and hay. But the 1944 goals will call for a further increase in milk cow numbers. If these goals are reached, sheep numbers may be reduced when they compete directly with milk cows. Where they compete with other cattle it would seem probable that sheep numbers might be maintained.

In the 13 Western sheep States there seems to be a rather definite tendency to cut down sheep numbers, both by reducing the size of flocks and by liquidating flocks. Range sheep growers in these States have been harrassed by labor shortage, high wages for inefficient workers, difficulties with rationing and high costs of camp supplies. With sheep and lamb prices high many growers feel it is a good time either to sell out or cut down and get rid of or reduce their difficulties. Although there is much talk about "selling down" and "quitting" doubtless much of it is just talk but the general prevalence of it indicates that there is apt to be some liquidation of breeding sheep this year and perhaps more later.

In the 11 Western States, stock sheep numbers at the end of this year will probably be at the lowest level since 1925, and 6 million head or more than 20 percent below the peak numbers of 1931. Considering the suitability of sheep production to the character and location of the range feed over much of this area it would appear that under average range conditions such a number is below what is needed to get the largest production of meat from this area. Hence it is felt that a concerted effort should be made to prevent sheep production in this area from a further decline in 1944. In Texas and in the range area of South Dakota sheep numbers at the beginning of 1943 were at the peak and although they will be reduced in 1943 a further reduction, especially in Texas, might be desirable.

Production Goal for 1944

National Goal

The goal for sheep and lambs for 1944 should be to maintain stock sheep numbers at the level that will be reached at the end of this year. It is also suggested that the number of sheep and lambs on feed January 1, 1945 be 6.1 million head which would be the same number as estimated for January 1, 1944. It is estimated that ewes would decrease about 400,000 and that other stock sheep would increase by the same amount, as indicated in the table below.

Sheep and lambs: Feasible number on farms January 1, lamb crop, imports, and slaughter, 1944 and 1945, with comparisons

Item	:	:	:	:	Feasible	
	: 1940	: 1941	: 1942	: 1943	: 1944	: 1945
	:	:	:	:	: 1/	:
	:	:	:	:	:	:
	: Million	: Million	: Million	: Million	: Million	: Million
	: head	: head	: head	: head	: head	: head
On farms January 1	:	:	:	:	:	:
Ewes, 1 year +	:	:	:	:	:	:
Western sheep States ...	24.9	25.4	26.1	25.9	25.1	
Native sheep States	11.0	11.3	11.6	11.4	11.3	
Total	35.9	36.7	37.7	37.3	36.4	36.0
On feed	5.8	6.5	6.9	6.8	6.1	6.1
Other	10.7	11.1	12.1	11.0	10.4	10.8
Grand total	52.4	54.3	56.7	55.1	52.9	52.9
Lamb crop	31.3	32.9	32.6	31.0	30.2	
Imports .....	.0	.0	.0	.0	.0	
Total supply	83.7	87.2	89.3	86.1	83.1	
Slaughter	:	:	:	:	:	:
Federally inspected	17.4	18.1	21.6	20.7	18.0	
Non-inspected	4.2	4.2	4.3	4.0	4.0	
Total	21.6	22.3	25.9	24.7	22.0	
Exports	2/	.0	.0	.0	.0	
Other disappearance	7.8	8.9	8.3	8.5	8.2	
Total disappearance ..	29.4	31.2	34.2	33.2	30.2	
Number on farms end of year	54.3	56.7	55.1	52.9	52.9	

1/ Preliminary estimates.

2/ Negligible.

The attainment of this goal on numbers on farms on January 1, 1945 would permit a slaughter of 22 million head. Assuming a yield of lamb and mutton of 40 pounds (dressed weight), the total production of lamb and mutton would be 880 million pounds. This production of lamb and mutton is 70 million pounds below the estimated requirements of these classes of meat, but inasmuch as the goal for slaughter of cattle and calves exceeds the estimated requirements for beef and veal, it is assumed that a substitution in consumption can be made.

Distribution of the Goal by States

The goal for all sheep on farms January 1, 1945, which is the same as the estimated number that will be on farms on January 1, 1944, is 4 percent less than the number on January 1 of this year. The reduction in numbers compared with January 1, 1943 would be mostly in the Western States including South Dakota, Oklahoma and Texas and in Nebraska as shown in the accompanying table. Some reduction, compared with 1943 would be obtained in Minnesota, Iowa and Missouri. In general, sheep numbers would increase in Southeastern, East Central and Northeastern States.

What might be done to maintain numbers in the Western sheep States is rather uncertain. Probably the most effective means would be to insure an adequate supply of trained labor or an abundant supply of less skilled labor. More readily available camp supplies and repair parts to equipment and a liberalizing of food rationing might also help.

In the Native sheep States a program in the dairy areas might be undertaken to encourage the vealing of more dairy calves and sale of the poorer quality dairy heifers and any dairy type steers. In other areas it might be pointed out that sheep will produce more meat in a shorter time and bring higher returns per acre of pasture and hay than stock cattle or beef cattle.

Price Data For 1944 With Comparisons

		<u>Sheep</u>	<u>Lambs</u>
A. Historical and Present Prices Per Unit (100 lb.)			
(1) January 1935 - December 1939 average	\$	3.93	\$ 7.79
(2) 1941 average	\$	4.95	\$ 9.46
(3) 1942 average	\$	5.73	\$ 11.54
(4) July 1943 average	\$	6.77	\$ 13.30
B. Price Ceiling Provisions			
(1) Parity or comparable price July 1943	\$	7.47	\$ 9.70
(2) *Highest price January 1 - September 15, 1942	\$	5.83	\$ 12.30
(3) Price ceiling July 1943	<u>1/</u> \$	7.00-	<u>2/</u> 12.25-
		7.25	12.75
C. Price Support Provisions			
(1) Present support price	\$	---	---
(2) Present additional inducements	\$	---	---
(3) Total gross returns	\$	---	---
(4) 90 percent of parity	\$	6.72	\$ 8.73
D. Factors Affecting the 1944 Price Needed to Obtain Goal			
(1) July 1943 Index Price of Commodity			
Base 1909-14		149	226
(2) July 1943 Index Price of Commodity			
Base 1935-39		172	171
(3) July 1943 Index Commodities Used in Production			
Base 1909-14		164	164
(4) July 1943 Index Commodities Used in Production			
Base 1935-39		129	129
(5) *July 1943 Index of Farm Wages			
Base 1935-39		225	225
(6) Unit returns to equal return from competing crops			
E. Suggested 1944 Price			
(1) Suggested average price to farmers	\$	7.25	\$ 13.50
(2) Suggested inducements (average value per unit)	\$	-----	
(3) Total suggested return per unit	\$	-----	

* Seasonally adjusted.

1/ Estimated farm price derived from ceiling prices on mutton.

2/ Estimated farm price derived from ceiling prices on lamb carcasses and wholesale lamb cuts.

SHEEP AND LAMBS: SUGGESTED NUMBER ON FARMS JANUARY 1, 1945 WITH COMPARISONS

State and division	All sheep				1945 goal by classes		
	1937-41:		1945 Goal				
	1943		Percentage:		All	Ewes	Sheep &
			Number of		stock	1 yr. old	lambs on
			1/	1943	sheep	and over	feed
	1,000	1,000	1,000	Percent	1,000	1,000	1,000
	head	head	head	Percent	head	head	head
Maine	44	45	45	100	45	33	
N. H.	10	10	9	90	9	7	
Vt.	23	21	20	95	20	15	
Mass.	8	8	8	100	8	6	
R. I.	2	2	2	100	2	2	
Conn.	5	5	6	120	6	4	
N. Y.	374	358	360	101	310	236	50
N. J.	7	7	7	100	7	5	
Pa.	397	377	384	102	384	240	
N. E.	870	833	841	101	791	548	50
Ohio	2,325	2,303	2,260	98	1,920	1,400	340
Ind.	891	886	890	100	710	540	180
Ill.	891	874	890	102	660	490	230
Mich.	1,180	986	1,027	104	782	620	245
Wis.	468	491	490	100	400	310	90
Minn.	1,333	1,490	1,433	96	1,153	880	280
Iowa	1,676	1,866	1,790	96	1,230	990	560
Mo.	1,548	1,695	1,665	98	1,520	1,250	145
S. Dak.	1,574	2,492	2,400	96	2,100	1,620	300
Nebr.	895	1,285	1,072	83	412	320	660
N. Cent.	12,781	14,368	13,917	97	10,887	8,420	3,030
Del.	2	2	2	100	2	1	
Md.	69	58	63	109	63	47	
Va.	388	360	375	104	375	300	
W. Va.	501	438	450	103	450	350	
N. C.	57	56	58	104	58	43	
Ky.	1,052	1,057	1,080	102	1,080	900	
Tenn.	385	414	418	101	418	329	
E. Cent.	2,454	2,385	2,446	103	2,446	1,970	
S. C.	8	6	6	100	6	4	
Ga.	24	18	18	100	18	12	
Fla.	30	23	24	104	24	14	
Ala.	42	41	44	107	44	30	
Miss.	70	73	82	112	82	50	
Ark.	95	107	112	105	112	84	
La.	274	272	282	104	282	155	
Okla.	365	394	340	86	300	240	40
Tex.	9,416	10,677	9,990	94	9,750	6,400	240
South	10,324	11,611	10,898	94	10,618	6,989	280
N. Dak.	913	1,248	1,150	92	1,020	830	130
Kans.	768	1,539	1,330	86	750	590	580
Mont.	3,386	3,865	3,750	97	3,400	2,720	350
Idaho	2,138	1,799	1,640	91	1,500	1,350	140
Wyo.	3,676	3,781	3,840	102	3,650	2,930	190
Colo.	2,740	2,615	2,550	98	1,700	1,450	850
N. Mex.	2,244	2,162	1,975	91	1,850	1,480	125
Ariz.	810	748	700	94	690	500	10
Utah	2,574	2,471	2,430	98	2,300	1,950	130
Nev.	804	716	713	100	690	555	23
Wash.	654	598	580	97	525	390	55
Oreg.	1,840	1,414	1,270	90	1,230	1,000	40
Calif.	3,125	2,936	2,895	99	2,775	2,300	120
West	25,672	25,892	24,823	96	22,080	18,045	2,743
U. S.	52,101	55,089	52,925	96	46,822	55,972	6,103

1/ Estimated number that would be on farms Jan. 1, 1945 if the 1944 marketings and farm slaughter goal is achieved.

WOOL

Situation in 1943

Mill consumption of apparel wool is expected to continue at peak or near peak levels through 1943. Mills hold large unfilled orders for military fabrics. Civilian consumption quotas have been sharply increased over 1942 quotas and total consumption is limited chiefly by machinery and manpower capacity. Reported consumption of apparel wool in the first 6 months of 1943 totaled 597 million pounds (greasy shorn basis), about 50 million pounds more than were consumed in the same months last year. At this rate, total consumption for the year will approximate 1,200 million pounds.

Military requirements took over three-fourths of the total mill consumption in 1942 and the first half of 1943. The rate of consumption for civilian use was less than half of the reported 1935-39 average rate of consumption. Large stocks of civilian goods on hand January 1, 1942 prevented marked shortages of civilian goods up to the present. Stocks of civilian goods are now relatively small and the War Production Board and Army Quartermaster Corps have acted to increase the manufacture of civilian fabrics in the latter half of 1943. Deliveries of some military fabrics scheduled for late 1943 will be deferred until the early months of 1944. This will release facilities for increased production of civilian goods.

The carry-over of apparel wool on January 1, 1943, was reported at 716 million pounds. This includes commercial stocks held by dealers and manufacturers and the strategic reserve of foreign wools owned and held by the Defense Supplies Corporation (generally referred to as the Government stock pile). On January 1 the United States-owned Government stock pile totaled 301 million pounds. This carry-over does not include 409 million pounds reported as imported and stored for the British Government as of January 1, 1943. Such British stocks totaled 502 million pounds in July 1943.

Domestic production of shorn wool this year is estimated at 377 million pounds. This is slightly smaller than the record clips of 1941 and 1942 but is larger than in any other previous year. The decline compared with 1942 is primarily the result of the smaller number of sheep. The estimated number of sheep shorn or to be shorn this year is 47.7 million head compared with 49.8 million head in 1942. The 1943 goal called for 48.5 million sheep to be shorn. Production of pulled wool this year is likely to be about the same as last year when it totaled 67 million pounds (100 million pounds grease basis). The number of sheep and lambs slaughtered probably will be about the same or slightly smaller than last year's record slaughter. Even with the reduced requirements for shearlings for the Army Air Force now evident, the number of skins diverted to shearling pelts in 1943 will approximate 1942 production and may possibly be greater.

The shipping situation for wool is now relatively favorable and it appears that imports could continue large. Imports of apparel wool in the first 6 months of 1943 exceeded 300 million pounds grease basis. It is likely that about 630 million pounds will be imported during 1943, mostly for commercial account. Large quantities of fine wool are available in Australia and substantial quantities of grades 46s to 56s which are required in the manufacture of Army fabrics are available from South America.

On the basis of the above estimates, it appears that the total supply for 1943 will exceed 1.8 billion pounds. If consumption totals 1.2 billion pounds, the carry-over on January 1, 1944 will be over 600 million pounds. This will include the Government-owned stock pile of foreign wool and any unsold stocks of the 1943 domestic clip held by the Commodity Credit Corporation.

Growers are assured of a market for all of their 1943 wool through the Government purchase program. The Commodity Credit Corporation is now buying the 1943 domestic wool production (with certain exceptions) for resale to manufacturers. The program is being handled through the regular trade channels. Prices to growers are the current ceiling prices less freight and handling charges.

Requirements for 1944

Requirements for 1944 will depend to a considerable extent upon military developments. So long as the war continues, total consumption will be limited by machinery and manpower difficulties. Military requirements accounted for about three-fourths of the total consumption during 1942 and the first half of 1943 when the Army and Navy were being built up rapidly. A favorable termination of the European conflict would practically stop military requirements. Bare maintenance requirements of the armed forces, however, will be heavy as long as the war continues and lend-lease and other export requirements will undoubtedly increase materially in 1944 over those of 1943. Moreover, civilian consumption has been sharply limited since early 1942. Civilians undoubtedly would take a larger quantity of wool goods if available. If the war should end shortly, release of members of the armed forces will stimulate further wool consumption. Civilian demand may be large enough to support a high rate of activity even though military requirements are sharply reduced. Considering all these factors, it is estimated that mill consumption of apparel wool in 1944 will be about 1 billion pounds greasy shorn basis. If the war continues throughout 1944 on both the European and Far-Eastern fronts, consumption will undoubtedly be higher.

Supplies for 1944

As indicated above, the carry-over may be about 625 million pounds. Domestic production for 1944 probably will be smaller than in 1943 because of a smaller number of sheep available for shearing. If Army requirements for shearlings continue at the reduced rate now indicated for 1943, a moderate decline in slaughter in 1944 could be offset by a considerable reduction in the number of pelts diverted to use as shearlings, and production of pulled wool probably will not differ much from the 1942 and 1943 production of about 100 million pounds grease basis. Assuming that shorn wool production is down from 1943 because of a decline in sheep numbers estimated for January 1, 1944, the total production (shorn and pulled) would be about 470 million pounds.

Imports of wool will depend primarily upon consumption requirements during 1944 and the willingness of the Governments of the United States and Great Britain to reduce their combined stock pile. Supplies of wool available for export in the Southern Hemisphere will be large. If the present favorable shipping situation from Australia is maintained, it is anticipated that sufficient space will be available to satisfy import requirements.

Recommendations for 1944

In view of the rather large supplies of wool (including the combined stock pile) which will be available in the United States on January 1, 1944, the large supplies of wool which will be available for shipment in the Southern Hemisphere and the anticipation that sufficient shipping space will be available to fill import requirements, it seems unnecessary to undertake special measures for increasing domestic wool production at this time. In fact, a moderate decline in sheep numbers available for shearing, while aiding in balancing number of livestock and forage and feed supplies, should not prove serious to the wool program.

In view of the large stock pile of wools of foreign origin and possibility of imports in 1944, the Government should continue its purchase program relating to the domestic wool production for the duration and 1 year thereafter in order to stabilize the market and protect the wool growers.

Prices of domestic wools are higher than prices of similar foreign wools. While this condition holds, the chief outlet for domestic wools is in military contracts which specify domestic wool. Hence, a decline in military orders will curtail market for domestic wool and prices are likely to decline unless Government continues some form of support.

It would appear that the Government stock pile is now ample and may be in excess of need in view of the existing situation with regard to reduced military needs, production, imports, and British stocks in this country. The Department should take steps to work out with proper authorities the minimum adequate stock pile needed for military, lend-lease and other export purposes. To the extent the stock pile exceeds the minimum adequate reserve, it would appear advisable to draw wool from the stock pile in place of importing additional wools. This might be done either by requiring mills with Government contracts calling for or allowing the use of foreign wool, to purchase their supplies from the Defense Supplies Corporation, or for the Government to supply such quantities as needed directly from its stocks rather than from imports.

United States: Supply and consumption (mill) of apparel wool, 1935-44 1/

(Greasy shorn basis)

Item	1935-39 average	1942	Estimated	
			1943	1944
	Million pounds	Million pounds	Million pounds	Million pounds
Supplies				
Stocks January 1 <u>2/</u>				
Commercial	290	366	415	
Government stock pile <u>3/</u>		162	301	
Total <u>3/</u>	290	535	716	623
Domestic production	458	492	477	470
Imports <u>4/</u>	89	728	630	630
Total reported supplies	837	1,755	1,823	1,723
Consumption (mill)				
Civilian	616	230	350	400
Military and export	20	270	850	600
Total	636	1,100	1,200	1,000
Carry-over (calculated) <u>3/</u>	201	655	623	723
Carry-over reported <u>5/</u>	248	716		
Excess reported over calculated ...	47	61		

1/ The figures in this table, while uncertain in some aspects, have been built up after consultation with the various interested governmental agencies and serve to give a fairly accurate picture for year to year comparisons.

2/ Excludes wool afloat and tops.

3/ Does not include wool owned by the British Government, even though the United States can use part of this.

4/ Includes wool purchased by United States Government for its stock pile but not imports to this country for account of Great Britain.

5/ The difference between reported stocks and calculated stocks probably is due to incomplete records on stocks, to different methods of reporting imports and stocks, and to lack of complete data for converting weights of washed and scoured wools to a greasy shorn equivalent.

Price Data For 1944 With Comparisons

A. Historical and Present Prices Per Unit (lb.)

(1) January 1935 - December 1939 average	\$.238
(2) 1941 average	\$.351
(3) 1942 average	\$.382
(4) July 1943 average	\$.415

B. Price Ceiling Provisions

(1) Parity or comparable price July 1943	\$.302
(2) *Highest price January 1 - September 15, 1942	\$.410
(3) Price ceiling July 1943	1/ \$.40-.42

C. Price Support Provisions

(1) Present support price	\$ ---
(2) Present additional inducements	\$ ---
(3) Total gross returns	\$ ---
(4) 90 percent of parity	\$.272

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1) July 1943 Index Price of Commodity	
Base 1909-14	227
(2) July 1943 Index Price of Commodity	
Base 1935-39	174
(3) July 1943 Index Commodities Used in Production	
Base 1909-14	164
(4) July 1943 Index Commodities Used in Production	
Base 1935-39	129
(5) *July 1943 Index of Farm Wages:	
Base 1935-39	225
(6) Unit returns to equal return from competing crops	

E. Suggested 1944 Price

(1) Suggested average price to farmers	\$.40-.42
(2) Suggested inducements (average value per unit)*	\$ ---
(3) Total suggested return per unit	\$ ---

1/ Estimated farm price derived from ceiling prices at Boston.

* Seasonally adjusted.

Production Goals
1944

2-23-44

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OILCROPS 1/

SUMMARY

Requirements for edible fats and oils in 1944, as determined by WFA allocations, total 8.25 billion pounds. Production from domestic materials, assuming the same output of vegetable oils in the fourth quarter of the year as in the fourth quarter of 1943, is estimated at 7.85 billion pounds. To make up the difference of about 400 million pounds it is planned to import 230 million pounds of edible oils -- cottonseed, peanut, and sunflower -- and to divert 300 million pounds of linseed oil to edible use. Thus stocks would build up by approximately 130 million pounds during the year. This is considered inadequate, since stocks of edible fats and oils at the beginning of the year were below pre-war levels and requirements in 1945 probably will be larger than in 1944, particularly if additional requirements for European relief should develop. Moreover, production of animal fats in 1945 is likely to be 400 to 500 million pounds less than in 1944, mainly as a result of a decrease in lard output. Unless vegetable oilcrop production is substantially greater this year than last, total production of fats and oils in 1945 will be less than in 1944.

Based on recent but not conclusive, information, it seems likely that soybeans will fall short of the 1944 goal by at least 1,500,000 acres, flaxseed by about 600,000 acres, and peanuts by about 800,000 acres. The gain in vegetable oil production resulting from achievement of the 1944 production goals for oilcrops would about equalize the decrease in animal fat production anticipated in 1945. Therefore, the extent to which oilcrop production in 1944 falls short of the goals indicates roughly the extent by which total production of fats and oils will be reduced in 1945 from the 1944 level.

1/ Prepared as a supplement to the report dated August 23, 1943, by the 1944 Production Goals Committee for Oilcrops: Robert M. Walsh (BAE), Chairman; E. A. Johnson (OP); Ocie Coston, Martin Sorkin, J.R. Goodman, and R. O. Stelzer (AAA); E. T. Rocca, Jr. and George Prichard (CCC); H. H. Chapman, H. D. Bonham, G. A. Sallee, and Maxine Enlow (OD); E. B. Payles (BPI); C. H. Barber (OPAR); Lee Langsford, R. W. Hays, A. G. Nelson, J. A. Hicks, J. H. Peters, and E. L. Burtis (BAE).

The Oilcrops Committee recommends that efforts be made to come as close to the 1944 goals for oilcrops as possible. Specifically it is recommended:

1. That an intensive educational campaign be initiated on the needs for vegetable oil.
2. That ^C ~~RAIC~~ limited liability loans be made available to flaxseed and peanut growers.
3. That steps be taken to make soybean seed and peanut seed available to growers at reasonable prices.
4. That the prohibition of sale of soybeans for grinding for feed be continued.
5. That efforts be made to improve the marketing system for peanuts in the newer producing areas and that the program for making peanut harvesting equipment available on lenient credit terms be continued.
6. That the support price for soybeans be increased to not less than twice the price of corn in the Corn Belt, or approximately \$2.10 per bushel on the basis of recent corn prices. Possibly it would be necessary to increase the price to \$2.25 to obtain the full goal acreage. That the support price for peanuts be increased to not less than four-tenths of the price of cotton on a pound basis, or approximately \$160 per ton, to provide a slightly more than equal return per acre for peanuts than for cotton and thus to stimulate a further increase in peanut acreage. No change in the announced support price for flaxseed is recommended, since linseed oil can be substituted for edible oils only with great difficulty under present price relationships, and since an abundant supply of flaxseed is available in Argentina and shipping promises to show further improvement in 1945.

REQUIREMENTS FOR VEGETABLE FATS AND OILS

The following summarize the situation with regard to the requirements and supplies of the vegetable oils in 1944:

1. We are entering 1944 with a relatively low stock position of the edible vegetable oils -- corn, cottonseed, peanut and soybean. The total of the stocks of these four oils on December 31, 1943 was approximately 700 million pounds as compared with 685 million pounds on December 31, 1942 and 832 million pounds on December 31 for the average of 1937-41.
2. According to the allocation of the War Food Administration dated January 25, 1944, the requirements for the year 1944 for food fats

and oils will be 8,252 million pounds. This includes an allocation to Contingency Reserve and Liberated Areas of 299 million pounds for European Relief, which is certainly not adequate should the progress of the war bring a large proportion of Axis dominated Europe under Allied control.

The estimated production of the principal edible fats and oils for the calendar year 1944 is as follows:

Lard (excluding use in nonfood products)	3,102.0
Butter	1,965.0
Edible tallow	293.0
Corn oil	240.0
Cottonseed oil	1,240.0
Edible olive oil	9.5
Peanut oil ^{2/}	120.0
Soybean oil	1,260.0
Total	<u>8,229.5</u>
Less inedible uses including foots and refining losses	<u>384.0</u>
	7,845.5

Thus domestic production of the principal edible fats and oils will fall approximately 400 million pounds short of meeting the food requirement. It is planned to supplement domestic production by imports of cottonseed, peanut, and sunflower seed oil of approximately 230 million pounds and by using some 300 million pounds of linseed oil for edible purposes. Even so stocks of the edible fats and oils will only build up some 130 million pounds which is not an adequate reserve against Relief needs.

Furthermore, the estimates of the edible vegetable oils assume that 1944 crops will be approximately equal to the 1943 crop. If they fall short a critical situation could rapidly develop. Animal fat production in 1945 is likely to be 400 to 500 million pounds less than in 1944. Unless vegetable oilcrop production is increased substantially this year, total production of fats and oils in 1945 will be less than in 1944.

3. In the case of linseed oil the requirements for the traditional uses could be met by a much lower production than we will have this year but linseed oil is one of the very few sources of supply to supplement the tight situation in other fields.

^{2/} Peanut oil has been reduced to 120 million pounds on the advice of CCC. On the basis of the crop at least 150 million pounds should be available.

4. We have no reason to think that the requirements in 1945 will be materially less than in 1944 and may be much greater, depending upon the need for European Relief. We have little prospect of entering 1945 with anything more than moderate increases in stocks. Consequently, a slackening off of production will present a serious problem.

SOYBEANS

Prospects for Attaining Soybean Goals

It is unlikely that the announced United States soybean goal of 13,654,000 acres will be reached. It is the opinion of the Committee that the soybean acreage will fall by at least one and one-half million acres of meeting the announced goal. On the basis of the present announced price of \$1.94, it is estimated that approximately 12 million acres would be harvested for beans.

This unfavorable outlook is due mainly to an unsatisfactory corn-soybean price relationship. The historical corn-soybean yield ratios vary from about 2.3 in central Illinois to 3.0 in northwest Iowa. The bulk of the United States soybeans is produced in areas where these corn-soybean yield relationships hold.

There are minor areas where the corn-soybean yield relationships vary above and below these ratios. The 1944 goal calls for an increase of approximately 2,850,000 acres in the United States, or a little more than 25 percent.

Also, the improved varieties of high-yielding oats along with the use of oats as a nurse crop will result in oats being in a much more favorable competitive position than formerly. Farmers in the soybean-producing area will begin to feel the full impact of the tight feed situation by spring. This shortage of feed will be reflected in increased corn acreages.

The adjustments needed to bring about these increases in soybeans can best be done through an upward revision in the price of soybeans.

Recommendations Regarding Soybeans

1. The support price of soybeans should be increased to not less than \$2.10, which is twice the price of corn in the Corn Belt as of January 15. Possibly it would be necessary to increase the price to \$2.25 in order to obtain the full goal acreage. In recommending the increase in the price of soybeans, the Committee has considered the costs involved in obtaining this additional acreage, the possibilities of obtaining vegetable oil from other sources, the effect upon fats and oil rations in 1945 and the international requirements and commitments.

2. An intensive educational campaign should be initiated on the needs for vegetable oil.

3. The prohibition of sale of soybeans for grinding for feed should be continued. Of the 1943 crop, approximately 10 million bushels of soybeans will be fed on farms. This includes soybeans fed on farms where produced, either fed whole, ground, or in mixtures. However, it does not include soybeans sold from the farms where produced for feed on other farms, nor any soybeans sold to feed mixers for grinding and resale. The loss of oil resulting therefrom was substantial.

4. Steps should be taken to make soybean seed available at reasonable prices to farmers. These steps might include setting a ceiling on soybean seed and the program of supplying soybean seed at fair prices through the Commodity Credit Corporation.

FLAXSEED

Prospects for Attaining Flaxseed Goals

Reports from the field indicate that the 1944 flaxseed acreage will be down substantially from the 6,320,000 acres planted in 1943. It is the opinion of the Committee that approximately 5 million acres of flax will be planted for harvest in 1944, compared with a revised United States goal of 5,595,000.

According to the January crop report, the preliminary estimates of flaxseed planted for 1944 in California, Arizona, and Texas is 243,000 acres. This is 128,000 acres under the acreage planted in these States last year. Reports from Minnesota compiled on the basis of a county-by-county estimate indicate that approximately 1.5 million acres will be planted. On the basis of these reports, the State War Board has requested a reduction in the State goal from 1.8 million to 1.5 million. This inclination to reduce flaxseed acreage is due in part to recent experiences with weedy fields and the feeling current among farmers that wheat is a much safer crop. Similar reports have been received from North and South Dakota.

Based on the historical price relationships, farmers in the high-risk areas of Montana and North Dakota would need a price substantially in excess of \$3.00 to offset the higher returns from wheat. The increase in the flaxseed support price over 1943 is very slight compared with the increase which has occurred in wheat prices. With ceiling prices for flaxseed of \$3.05, Minneapolis, prevalent during most of the 1943-44 marketing year, the increased support price will mean very little change in prices to farmers.

The elimination of wheat allotments for 1944 and the substantial increase in wheat acreage requested has changed the available land situation

substantially in the heavy flaxseed area. Along with this has occurred the tremendous disappearance of wheat and knowledge among farmers of the great needs. The relatively good oats prices, the introduction of higher yields oats varieties, and the reluctance among farmers to switch from oats to flaxseed will prove barriers to meeting the goal.

Recommendations Regarding Flaxseed

1. RACC limited liability loans similar to those made available in 1943 should be instituted for use in the 1944 crop year.
2. Since linseed oil is one of the oils in greatest abundance relative to traditional uses and presents difficulties in interchanging with other vegetable oils, as much effort as possible should be exerted in the direction of maximizing the production of soybean oil.
3. If the goals for flaxseed are not reached, and additional quantities of linseed oil are needed, boats should be made available to import flaxseed from the Argentine, where abundant supplies are available.
4. On the basis of the State reports, a support price of \$3.50 at Minneapolis would be needed in order to meet the goals. This is a higher support level than the Committee would care to recommend in view of the availability of large quantities of flaxseed in Argentina. Therefore, the Committee recommends that no adjustment in the announced support price should be made.
5. An intensive educational campaign stressing the needs for vegetable oil should be initiated.

PEANUTS

Prospects for Attaining Peanut Goals

Under present programs and probable 1944 conditions, the Committee is of the opinion that the United States peanut acreage in 1944 will fall some 800,000 acres short of the goal of 5,213,000 acres. The situation varies some between major areas.

The acreage goals totaling 536,000 acres grown alone, adopted by the States of Virginia, North Carolina and Tennessee, are only about 3 percent higher than the acreage planted in 1943. A very high percentage of the peanut production is in the old established areas where peanuts have been produced for the edible trade. In these old areas peanuts are more profitable than alternative enterprises. However, a study of soil suitability for peanuts in these areas indicates that the 1943 acreage level

would require peanuts to be grown on the same land more often than is desirable if yields are to be maintained. In some other areas in these States suitable for peanut production, tobacco represents a more profitable use of labor and land. It has been reported that some farmers feel that, on the basis of the present program, they are not realizing the full value of their product in that the prices paid by the edible trade are higher than prices which they have received. For these reasons the Committee is of the opinion that Virginia, North Carolina and Tennessee will not have a greater acreage of peanuts in 1944 than in 1943, perhaps 16,000 acres less, which would mean that they would fall nearly 40,000 acres short of the grown-alone acreage goal.

The total "grown alone" acreage goal totaling 3,096,000 acres, adopted by the States of Alabama, Florida, Georgia, Mississippi and South Carolina, is about 14 percent greater than the 1943 acreage and the picked and threshed goal is about 12 percent above the 1943 picked and threshed acreage. The situation in the old production areas of these States (and about 80 percent of the 1943 acreage was in these areas) is similar to that in the Virginia-North Carolina area in that overcropping has occurred. In the newer areas, particularly in Mississippi and South Carolina, harvesting and marketing difficulties were encountered in 1942 and 1943. The lifting of cotton-marketing quotas may increase the amount of land and labor devoted to cotton in some areas, thereby reducing the peanut acreage over 1943. The Committee is of the opinion that the grown-alone acreage in 1944 will be little if any larger than in 1943, which means that 1944 acreage would be about 360,000 acres short of the goal. If good stands are obtained, if favorable weather for cultivating and harvesting prevail, and if feed-crop yields are average or better, and if labor is available in the areas where peanuts are hogged, it is quite possible that the picked and threshed goals will be more nearly attained than the total acreage goal. However, if adverse conditions prevail, the reverse may be true.

The total peanut acreage goals are 2,565,000 acres for Arkansas, Louisiana, Oklahoma, and Texas. ^{3/} This represents an increase of 60 percent in the case of Oklahoma and 10 percent in Texas over the 1943 acreage. In 1943 farmers in both Texas and Oklahoma increased peanut acreage materially over the acreage planted in 1942. Yields and harvesting weather were favorable in 1942, whereas yields were quite low in Texas, Oklahoma and Arkansas in 1943 and considerable abandonment occurred. This may affect farmers' action toward peanuts in 1944. In the older producing areas, particularly the Cross Timbers area and the Big Grande Plains area of Texas and the Coastal Plains area of Oklahoma, the returns from peanuts compare favorably with competing crops and it is quite likely these areas

^{3/} Includes WFA suggested goals of 150,000 acres for Arkansas and 100,000 acres for Louisiana. These States did not adopt goals.

will about maintain their 1943 acreage, however, in those areas most of the well adapted peanut soils were planted to this crop in 1943. In the newer areas such as northeast Texas, Louisiana and Arkansas, harvesting and marketing difficulties were encountered and farmers and local agricultural leaders will have to be convinced that these difficulties will be removed before they will increase peanut acreage in 1944. Peanut production makes the soil more subject to wind erosion than most other row crops. The dry summer and fall of 1943 will tend to retard increases in peanut acreage in the low plains area of Texas and Oklahoma. Limited RACC loans were available in some counties in Texas, Oklahoma and Arkansas in 1943. If such loans are not available in 1944, some farmers may plant less peanuts than in 1943. It has been reported that there may be a shortage of high quality seed peanuts in some areas of the Southwest in 1944 unless a satisfactory seed program is inaugurated. The Committee believes that the South Central area will have a larger acreage of peanuts in 1944 than in 1943 but that it may fail to reach the goal alone acreage goal by about 450,000 acres. With favorable conditions the picked and threshed acreage goal may be more nearly attained.

Recommendations Regarding Peanuts

1. As cotton is the crop which competes most with peanuts for the use of land and labor, it is recommended that support prices for peanuts during the 1944-45 marketing year be established at not less than four-tenths of the price of cotton on a pound basis. At present cotton prices, this would mean an average of not less than \$160 per ton for peanuts. In areas equally adapted to the production of peanuts and cotton, studies indicate that returns are about equal when peanut prices, on a pound basis, are three-eighths as much as cotton prices. It is believed, however, that a little additional incentive for increasing peanut acreage should be provided. Even at \$160 per ton it is questionable if goals will be reached. A considerably higher price probably would be necessary to attain the goals.
2. In the new producing areas it is suggested that the purchase program be reviewed and an attempt be made to improve the marketing system of previous years.
3. It is recommended that a seed program, which provides for making farmers' stock peanuts available to seed dealers, be initiated. The program should be designed so that the farmer could purchase farmers' stock, cleaned or shelled peanuts, whichever he desires, at reasonable prices.
4. It is recommended that the program for making peanut harvesting equipment, particularly pickers, available on lenient credit terms be continued and that emphasis be put on side delivery rakes, which materially reduce the harvest labor requirement and cost.

5. If limited liability RACC loans or crop insurance are provided for any crop, it is recommended that they be made available to peanut producers. Any changes in the peanut program should be made immediately if they are to affect 1944 production.

6. An intensive educational program stressing the need for vegetable oils should be conducted.

POTATO AND SWEETPOTATO GOALS FOR 1944

POTATOES, WHITE

Production and Supply

A record production of white potatoes is in prospect for 1943. Estimated production is placed at 443,067,000 bushels for 1943, compared with 371,150,000 bushels in 1942, and the ten-year (1932-41) average of 363,332,000 bushels. The indicated yield per harvested acre on the large acreage of 1943 is 131.7 bushels as of August 1, 1943.

In response to favorable prices throughout the marketing season for the 1942 crop, and other production incentives, growers increased 1943 acreage to a level approximately 6 percent above the 1943 goal. The indicated acreage for 1943 is 3,444,000 acres compared with a 1943 goal of 3,260,000 acres and a planted acreage in 1942 of 2,793,000 acres.

Requirements for 1944

Total estimated requirements for 1944 are somewhat above those of 1943. Considerable increases in both civilian and non-civilian requirements are indicated. Per capita civilian requirements during the calendar year 1944 are estimated at 150 pounds, compared with the five-year (1935-39) average of 130 pounds. The distribution of the requirements for 1944 is shown in the following table:

Potatoes: Requirements for 1944

Item	: Million
	: Bushels
Civilian food	327.5
Non-civilian food	61.2
Industrial (starch)	10.0
Feed, waste, and shrinkage	24.3
Seed	57.0
Total requirements	479.0

Acreage Goal.

The 1944 acreage goal was placed at 3,500,000 acres, by the Review Committee. This compares with a 1943 planted acreage of 3,444,000 acres and an estimated 1944 war-time capacity of 3,917,000 acres. The goal was allotted among States in accordance with indicated war-time production capacity. Larger increases in acreages of late producing States are recommended. Most of the early producing States show moderate increases. The State distribution of the goals is shown in the attached table.

Careful consideration to marketing problems was given in distributing the early commercial goals. Goals were allotted to areas according to their respective marketing seasons to assure an even flow of supplies during the spring and summer months. The recommended goals for early commercial areas are shown in the attached table IIa.

Given average growing conditions, with the 1944 acreage goal set at 3,500,000 acres, a production of 447,000,000 bushels of potatoes would be obtained. This will provide for a civilian per capita consumption of 135 pounds which is 15 pounds below the estimated per capita requirement. The adjusted five-year (1937-41) average yield per planted acre is 127.3 bushels, compared with 132.9 in 1942, and 128.6 indicated for 1943. The following table shows the production on 3,500,000 acres at various yield levels.

Potatoes: Production Resulting from Various
Yield Levels on 3,500,000 Acres

Planted Acres	Bushels Per Acre	Production 1,000 bushels
3,500,000	115	402,500,000
3,500,000	120	420,000,000
3,500,000	125	437,500,000
3,500,000	130	455,000,000
3,500,000	135	472,500,000
3,500,000	140	490,000,000

SWEETPOTATOES

Production and Supply

The production of sweetpotatoes for 1943 is indicated at 81,255,000 bushels as of August 1. This compares with 65,380,000 bushels in 1942, and a ten-year (1932-41) average of 69,291,000 bushels. The average yield per acre for 1943 is placed at 88.0 bushels on August 1, compared with 92.4 bushels in 1942, and 83.2 for the ten-year (1932-41) period.

The 1943 acreage of sweetpotatoes has been estimated at 923,000. This is about 35 percent above 1942 at 707,400 acres, and slightly over 10 percent above the ten-year (1932-41) average of 833,000 acres. Acreage increases occurred generally throughout the main sweetpotato growing section with the most substantial increase occurring in Texas.

Production increases indicated on August 1 are quite well distributed throughout the main sweetpotato area.

Requirements for 1944

Estimated civilian requirements of sweetpotatoes for food in 1944 are placed at 28.8 pounds per capita/1. This compares with a consumption of 22.2 for 1942, and 23.4 for the period 1935-39. On this basis the net total food and industrial non-food requirements to be met out of 1944 production will be 74 million bushels. To this quantity must be added the requirements for seed and waste. It is estimated that it will require 7 million bushels for seed and about 6.5 million for waste allowance on a one-million-acre crop.

The detailed requirements are as follows:

Sweetpotatoes: Requirements for 1944

Item	Million Bushels
Food	
Civilian	67.4
Non-civilian	6.3
Industrial non-food	
Civilian	.4
Non-civilian	0
Food, waste, and shrinkage	6.55
Seed	7.0
Total requirements	87.65

/1. The Civilian Food Requirements Branch of the Food Distribution Administration indicates a per capita requirement of 32 pounds, but in view of marketing and storage difficulties has agreed to the figure of 28.8 pounds.

Food requirements account for 73.7 million bushels, of which civilian food requirements comprise 67.4 million bushels, and non-civilian 6.3 million. An allowance of 0.4 million bushels has been made for industrial non-food requirements.

The non-civilian food requirements 6.3 million bushels include 0.3 million canned, 2.4 million for dehydration, and 3.6 million as fresh potatoes.

Acreage Goal

A goal of one million acres is recommended for 1944. The expected production on this acreage is placed at 87.65 million bushels. This compares with the indicated requirements of 87.65 million bushels. This goal calls for an increase of 77,000 acres over that planted in 1943, or about 8 percent.

It is the opinion of the Committee that one million acres of sweetpotatoes is the maximum that can be handled by growers without serious loss of product due to shortage of storage facilities. The State production capacity reports indicate for 1944 an acreage of about 1.1 million. The goal suggested here is well below this estimate. The distribution of the acreage goal by States is shown in table III.

PROBLEMS IN MEETING GOALS FOR 1944

To meet the potato and sweetpotato goals, consideration must be given to the several problems that have accumulated during 1943, as well as the problems expected for 1944. A brief discussion of such problems follows:

Farm Labor

Farm labor requirements are being met by a smaller working force this year than last year largely as a result of an increase in the average length of the work day of agricultural workers. The supply of regular farm workers tends to be maintained because of special measures taken to check the out-movement of farm workers to the armed forces through occupational deferment and to industry through controlling transfers of workers from essential occupations by the War Manpower Commission. The employment of more women, children, and older men; the importation of Mexican, Jamaican, and Bahaman workers; the use of war prisoners; and the recruitment and placement of local labor have all contributed to the maintenance of the farm working force at its current level.

If the number of workers employed in agriculture can be maintained at present levels; and if the recruitment of non-farm persons for farm work and the use of imported labor can be maintained at current levels, growers should be able to produce as large an acreage as will be harvested this year. Attainment of higher production goals in 1944 is dependent largely upon possibilities of fuller utilization of labor on farms and the possibilities of taking care of the labor needs at harvest time through recruitment of more non-farm workers. In addition, some redistribution of the farm labor supply to assist with harvest work could contribute to the attainment of production goals in 1944.

Farm Machinery

The goal set for potatoes, which is 25 percent above the acreage in 1942, will require a considerable amount of additional machinery for planting, digging, and spraying. The 1943 farm machinery program seemed quite adequate for the 1943 goal but plantings exceeded this acreage. The machinery provided for 1943 was not available for use during the crop year, but will be available in 1944.

The 1944 potato goal is 707,000 acres above that of 1942. Assuming that two-thirds of the additional acreage can be cared for by existing equipment or would be planted by hand, approximately 235,000 acres would have to be taken care of with additional equipment. About 6,000 planters would be needed for the additional potato acreage. Deducting the planters furnished in 1943 means that at least 4,500 new planters would be required for 1944.

It is estimated that 5,700 additional harvesting machines will be required based upon the following allocation:

Type of Digger	: Number Required	: Number Furnished 1943	: Number Required 1944
Walking	1,500	300	1,200
Elevator	6,000	1,800	4,200
Pickers	500	200	300
Total			5,700

A similar increase in potato sprayers should be made available.

The number of machines is much more than was asked for by the War Boards, but the goals necessary to provide an adequate supply of potatoes and sweet-potatoes are larger than was anticipated. The estimates of the War Boards are very conservative inasmuch as requests from farmers with small acreages were excluded. Furthermore, small operators find planting and harvesting very difficult because many can no longer depend upon the services of large growers.

Fertilizer and Spray Materials

The over-all prospects for fertilizer in 1944 are favorable.

All indications point to an ample supply of nitrogen, an element which was markedly short in 1943.

It also appears that an adequate supply of superphosphate will be available. The 1944 agricultural requirements which were initially set at 6,600,000 tons have been increased to permit direct applications. This will provide for any additional acreage of potatoes and sweetpotatoes to be planted in 1944.

Estimates indicate a slight decrease of some 10 percent in the supply of potash available in 1944 as compared with that of 1943. It is possible that imports from Russia may be available to partly offset this decrease. Crops produced on heavier soils will continue to yield well despite some decrease in the potash application but potash is an essential element for the lighter soils. Since both potatoes and sweetpotatoes are classed as "A" crops for 1943-1944, ample supplies of complete fertilizer will be available.

All indications point to ample supplies of spray material for potatoes in 1944. The 1943 allocation of copper sulphate for spray material will be ample to meet this year's needs. Present plans are to increase the 1944 allocation by 14 percent above 1943. Adequate supplies of arsenate and lime for spray and dust are also in prospect for 1944.

Production Incentives

In order to attain the 1944 acreage goals it is necessary that the Department assure growers of minimum returns in compliance with existing legislation. This may be through price support by purchases, loans or both. Production may be kept in line with goals by incentive, or direct payments.

Non-recourse production loans will be needed in 1944. Large cash costs are involved in growing potatoes. Much of the expansion requested over 1942 will involve greater risks and production hazards.

Storage Capacity for Potatoes

An expansion in the production of potatoes in 1944 to a total of 447 million bushels would necessitate a large expansion in storage facilities. Even at the present time all storage facilities for potatoes in the commercial producing areas of Maine, Idaho, and the Red River Valley, are known to be greatly inadequate. In view of the large production this year, the War Food Administration requested, and the War Production Board approved, the allocation of materials for the construction of new storage sufficient to take care

of 15 million bushels, of which 11 million were intended for the commercial crops. Due to the shortage of time and the scarcity of lumber and labor, it is doubtful that this program can be accomplished this year.

In dealing with the storage situation, the following factors should be considered:

- (1) Small farm storage. In the areas where production is on a farm basis rather than a commercial basis, two things can be done
 - a. Unused storage facilities could be renovated and preserved for future use as potato warehouses.
 - b. Existing structures such as basements of old barns or houses could be converted to potato storage. This, of course, would require considerable educational work among the workers involved.
- (2) Commercial storage. In most of the late commercial producing areas, emphasis will need to be placed on the construction of new buildings involving considerable amounts of critical materials except in Idaho where it is possible to build storage cellars. In these areas it will be important that plans for additional storage are made in ample time to assure completion before harvest.
- (3) Consumers. Since the storage problem will be serious if a crop of 447 million bushels is produced in 1944, consumers could help alleviate the storage situation by purchasing larger quantities of potatoes at digging time than is their custom and store them where possible. Information as to the best methods of keeping potatoes under such circumstances could be passed on to consumers.

A major portion of the potato storage must be built in the areas of late production. The greatest additional need for storage will exist in the large commercial producing areas such as Maine, the Red River Valley of the North, and in localized areas of Colorado, Idaho, Washington, and Oregon. Farm producing States could absorb increased production more readily than the surplus producing States where storage capacity is now at a premium.

Storage for Sweetpotatoes

Any increase in the production of sweetpotatoes over the indicated crop of 81 million bushels would necessitate a program for storage and curing houses in addition to what has been requested to take care of this year's crop. From estimates by the State Extension Services, the USDA War Boards, and other sources, there is an apparent need of additional storehouses for 12.6 million bushels. Material for this additional storage has been requested. Emphasis is being placed on the conversion of existing buildings into sweetpotato storehouses as it is too late in the season to construct many new ones for use in 1943.

Storage houses for sweetpotatoes need to be widely distributed because sweetpotatoes are produced in small acreages scattered throughout the main producing States and can be moved only short distances before going into the curing and storage houses. This makes possible the conversion of many small buildings on farms and in towns.

Factors Pertinent to both White and Sweetpotatoes

A question that might arise in connection with a greatly expanded storage problem of either white potatoes or sweetpotatoes is that of whether producers and commercial warehousemen would be willing to use their own funds in building the necessary structures. If they do not move fast enough to assure the required facilities, it will be necessary for some governmental agency to do the job. This problem will require considerable attention to insure that a program is instituted which will obtain the desired action.

Flow to Market

The suggested national increase in white potato and sweetpotato production has been distributed in a manner that should permit an orderly flow to market throughout the year, unless unforeseen circumstances arise.

White Potatoes. In allotting the acreage of early potatoes, consideration was given to the quantity that can reasonably be transported and marketed without excess wastage. Accordingly, the deep South was allotted an acreage designed to supply most of the early summer's requirements of the East Coast, while California, Texas, and other Southwestern States were allotted an acreage ample to supply the early summer needs of the western part of the country. An average allotment to intermediate potatoes was granted to the States adapted to this type of production.

Lack of sufficient ice to cool potato cars accounted for considerable loss in the early and intermediate States in 1943. Much of the icing problem was due to the later harvest and the hotter than usual weather encountered by shipments. Normally, only a small proportion of the shipments, principally those from California, need to be iced. However, reserves of ice should be planned also for shipping potatoes from such States as South Carolina, North Carolina, and Virginia, which incurred heavy losses in 1943. All existing ice plants in these States should be encouraged to produce at full capacity and more adequate ice storage facilities need to be built.

The principal expansion of the potato acreage is planned for the late potato States. This is because of the higher yields, the better keeping qualities, and the general desirability of the late varieties. In addition to filling the increased requirements for civilian consumption, ample supplies must be available at all times also for the military camps, for use on ships, and for other war purposes. Areas convenient to army camps and to dehydration plants may safely be asked to plant larger acreages than heretofore.

In view of the tight transportation situation, grading standards should be strengthened and the better quality potatoes given priority for storage and shipping space. Unnecessary cross-hauling of potatoes by public carriers should be restricted by a special transportation order if the problem is sufficiently serious. In case of unexpectedly high yields and an oversupply, consideration should be given to diverting the small and low quality potatoes to starch, to hog feed, and similar uses.

To insure uniform distribution of potatoes, the War Food Administration and the Office of Price Administration should support a price program that includes an adequate differential for each additional month that the potatoes are in storage from November through May.

The setting aside of sufficient quantities for seed should be safeguarded, through governmental purchase or other means, as soon after harvesting as feasible. Such potatoes should be protected from sprouting by keeping in a cool storage until distributed for planting.

Sweetpotatoes. Most of the increased acreage of sweetpotatoes has been allotted to heavy producing States of the South. These States are historically well adapted to sweetpotato production. Furthermore, the longer growing season makes plantings from vine cuttings feasible, thus producing a higher proportion of disease-free sweetpotatoes, a prime essential to successful storage.

Provision will need to be made to insure that growers have sufficient containers. Sweetpotatoes bruise easily and hence should be handled as little as possible. Storing and handling them in containers prevents unnecessary damage, saves labor, facilitates the distribution, and makes possible a more attractive product.

Another principal factor in maintaining an even flow to market is to see that plenty of sweetpotatoes go into storage in good condition in the fall. All other attempts to maintain an even flow to market will be of little value unless adequate curing and storage facilities are made available. Newly dug sweetpotatoes should be thoroughly cured for about ten days and then kept at a uniform temperature of about 55 degrees until marketed. Hence, the Government's price support program should include an adequate differential for each additional period that the sweetpotatoes are in storage from November until the following summer. One of the best opportunities to increase the consumption of sweetpotatoes in the large population centers of the North is to have ample supplies available at a moderate price in the

winter and spring when there is generally less competition from white potatoes and when sweetpotatoes are sweeter because of the conversion of starch to sugar that occurs in storage.

The use of a moderate quantity of sweetpotatoes for dehydration for canning, and for starch should afford additional outlets for the 1944 crop. Sufficient quantities of good disease-free stock should be set aside early in the year for seed purposes.

Respectfully submitted,

COMMITTEE ON 1944 GOALS FOR
POTATOES AND SWEETPOTATOES

A. B. Merckor, Chairman, FDA, F&V
Oscar R. LeBeau, FDA, CFRB
R. J. Sawille, FPA (loaned from FSA)
Ross V. Bauman, BAE
Chester R. Allender, FDA, F&V
Harry E. Riteliffe, FDA, T&S
J. C. Downing, BAE
M. L. Parsons, BAE
R. L. Mady, Ent., M.L.
Rex F. Henshaw, FPA
Paul J. Findlin, Ent.
Wm. T. Hicks, Ent., AAC
Reginald Royston, BAE
F. H. Whittaker, A.A., So.
H. E. York, A.A., So.
Arthur E. Brewster, FPA, CFRB

Potatoes: Requirements and Production - Table II

States	Production				Av. Yield		Assumed		1944 Goals	
	1937-41 Average	1942	Goal	Indicated	1937-41 Planted Basis	1944 Yield	Production	Acreage		
	1	2	3	4	5	6	7	8		
	: 1,000 bu.	: 1,000 bu.	: 1,000 bu.	: 1,000 bu.	: bu.	: bu.	: 1,000 bu.	: 1,000 acres		
Maine	41,416	42,120	45,719	53,760	265	265	53,000	200		
New Hampshire	1,132	1,082	1,350	1,360	146	146	1,460	10		
Vermont	1,780	1,473	1,376	1,317	133	133	2,128	16		
Massachusetts	2,325	2,350	2,300	2,750	140	140	3,640	26		
Rhode Island	834	975	940	1,071	186	182	1,092	6		
Connecticut	2,707	2,942	3,096	3,868	173	168	4,032	24		
New York	27,511	27,405	28,595	30,879	135	140	32,480	232		
New Jersey	9,536	10,136	11,505	11,999	177	177	12,390	70		
Pennsylvania	21,066	17,584	21,960	19,888	118	118	23,600	200		
Northeast	108,357	106,573	118,321	128,492			133,822	784		
Ohio	10,186	9,180	10,920	8,526	103	103	10,300	100		
Indiana	5,397	6,480	5,184	5,100	106	120	6,240	52		
Illinois	3,346	3,528	3,600	2,660	88	88	3,344	38		
Michigan	21,804	16,562	22,746	22,000	96	96	23,520	245		
Wisconsin	15,373	10,050	16,102	14,440	82	82	16,810	205		
Minnesota	20,278	19,380	23,154	21,505	85	85	24,225	285		
Iowa	5,429	6,600	5,890	5,700	94	94	5,358	57		
Missouri	4,486	4,173	4,784	3,404	105	105	4,410	42		
South Dakota	1,680	2,816	2,142	4,080	56	60	3,060	51		
Nebraska	9,235	12,876	10,296	14,720	112	120	12,000	100		
North Central	97,214	91,645	104,818	102,135			109,267	1,175		
Delaware	375	335	361	377	88	88	352	4		
Maryland	2,516	2,019	2,592	2,092	109	109	2,507	23		
Virginia	9,484	7,242	9,348	9,906	122	122	9,150	75		
West Virginia	3,093	3,808	3,636	3,420	96	96	4,032	42		
North Carolina	8,214	8,988	8,989	11,880	100	100	9,000	90		
Kentucky	3,464	4,560	4,284	4,770	82	82	4,428	54		
Tennessee	2,118	2,564	3,320	4,608	75	75	4,275	57		
East Central	30,264	30,516	32,540	37,053			33,744	345		

Potatoes: Requirements and Production - Table II Continued

	Production				Av. Yield			Assumed			1944 Goals		
	1937-41	1942	1943	1943	1937-41	1943	1943	1943	1943	1943	Production	Yield	Acreage
	Average		Goal	Indicated	Planted			Yield					
	1	2	3	4	5	6	7	8					
	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	bu.	bu.	bu.	bu.	1,000 bu.	1,000 bu.			acres
South Carolina	2,762	3,108	3,300	3,570	114	110					4,070		37
Georgia	1,438	1,782	2,010	2,275	63	63					1,300		30
Florida	4,082	4,116	4,736	3,856	121	125					4,375		35
Alabama	4,307	3,822	5,472	5,170	94	86					4,400		50
Mississippi	1,367	1,817	1,843	1,960	62	62					2,046		33
Arkansas	3,184	3,619	3,840	4,758	79	79					4,345		55
Louisiana	2,525	2,520	3,000	3,590	60	60					3,600		60
Oklahoma	2,207	2,244	2,627	2,838	72	72					3,340		45
Texas	3,757	5,301	7,340	6,450	70	80					6,000		75
Southern	25,929	28,529	34,233	34,476							33,966		420
North Dakota	13,539	17,955	16,393	18,480	94	94					17,860		190
Kansas	2,463	2,300	2,660	2,208	91	91					3,003		33
Montana	1,556	1,725	1,818	2,760	92	92					2,484		27
Idaho	29,406	30,590	35,090	43,425	225	225					40,500		180
Wyoming	1,930	2,470	2,301	2,640	110	125					2,750		22
Colorado	12,487	17,020	14,863	15,725	149	175					15,750		90
New Mexico	290	340	518	420	72	72					504		7
Arizona	207	562	547	1,258	132	180					1,620		9
Utah	2,143	2,312	2,639	3,330	164	164					3,280		20
Nevada	369	483	458	525	175	195					975		5
Washington	8,171	7,800	8,930	10,600	197	197					10,441		53
Oregon	6,941	7,200	8,928	9,805	196	196					9,800		50
California	19,952	23,130	24,735	29,735	291	300					27,000		90
Western	99,454	113,887	119,380	140,911							135,967		776
United States Totals	361,218	371,150	410,392	443,067	123.8	127.3					446,766		3,500

Potatoes: Early Commercial Acreage Goals for 1944

Table II-A

States and Groups	1937-41 Average	1942	1943	1944 Goal
	1	2	3	4
(Thousand of Acres)				
Winter:				
Florida-South	11.9	10.0	11.5	12.5
Texas	2.7	1.3	1.0	1.0
Total.....	14.6	11.8	12.5	13.5
Early-1				
Florida-North	16.5	15.0	15.1	16.9
Texas	7.4	8.4	11.0	11.0
Total.....	23.9	23.4	26.1	27.9
Early-2				
Alabama	24.9	25.9	20.0	18.5
California	34.6	35.0	45.0	45.9
Georgia-South	3.0	3.5	3.7	3.5
Louisiana	25.0	23.0	30.0	30.5
Mississippi	4.0	3.0	5.7	5.2
South Carolina	14.0	16.5	19.5	16.6
Texas - Other	10.0	6.4	9.4	8.2
Total.....	115.5	113.3	133.3	128.4
Second Early:				
Arkansas	4.5	4.5	7.0	5.3
North Carolina	35.7	32.0	30.0	32.5
Oklahoma	5.3	3.7	7.5	6.2
Tennessee	3.8	4.2	7.0	5.6
Total.....	49.3	44.4	60.4	49.6
Intermediate-1				
Georgia-North	1.5	1.9	2.1	1.9
Kansas	10.4	7.0	5.2	6.4
Kentucky	3.9	4.0	4.5	4.6
Maryland	5.8	5.0	6.3	6.4
Missouri	5.7	5.1	2.0	4.7
Virginia	46.3	35.7	37.8	35.2
Total.....	73.6	58.7	57.9	59.2
Intermediate-2				
Nebraska	4.1	4.1	3.6	6.9
New Jersey	46.6	48.0	60.0	59.5
Texas-Panhandle	6.4	6.5	8.0	8.4
Total.....	57.1	58.6	74.6	74.8
Total Early Commercial	334.0	310.2	364.9	353.4

Potatoes: Suggested Planted Acreage 1944 with Comparisons - Table III

State	1937-41 Average Planted	1942 Planted	1943 Goal	1943 Indicated Plantings	1944 Acreage Capacity	1944 Goal	1944 Capacity	Percent 1944 Goal of	
								1942 Planted	1943 Indicated
	1	2	3	4	5	6	7	8	9
	-- (Thousand of Acres) --								
Maine	156	156	185	192	200	200	100	128	104
New Hampshire	7	6.8	10	8.5	10	10	100	147	118
Vermont	13	11.6	16	14.2	16	16	100	138	113
Massachusetts	16	12.0	23	25	28	26	93	137	104
Rhode Island	4	5.	6	6.3	6	7	117	140	111
Connecticut	15	15.9	21	22.1	23	23	104	151	109
New York	204	195	250	226	275	252	84	119	103
New Jersey	54	56	70	71	90	70	78	125	99
Pennsylvania	179	167	211	180	220	200	91	120	111
Northeast	648	632.3	792	745.1	868	784	90	124	105
Ohio	100	90	106	100	110	100	91	110	100
Indiana	51	49	55	52	52.8	52	98	106	100
Illinois	38	36	40	38	45	38	84	106	100
Michigan	228	180	231	227	338	245	72	136	108
Wisconsin	190	158	194	190	220	205	93	130	108
Minnesota	238	215	256	262	310	285	92	132	109
Iowa	58	55	62	57	69	57	83	104	100
Missouri	43	40	47	42	40	42	105	105	100
South Dakota	30	33	35	54	44.8	51	114	155	94
Nebraska	83	76	86	95	114	100	88	116	105
North Central	1,059	932	1,112	1,117	1,343.6	1,175	87	126	105
Delaware	4	3.9	4.1	4.6	5	4	80	103	87
Maryland	23	19.6	24	22.5	25	23	92	117	102
Virginia	78	72	83	78	81	75	93	104	96
West Virginia	32	34	36	38	45	42	93	124	111
North Carolina	82	84	89	108	100	90	90	107	83
Kentucky	42	48	51	53	59	54	92	112	102
Tennessee	41	44	45	64	62.6	57	91	130	89
East Central	302	305.5	332.1	368.1	377.6	345	91	113	94

Price Data For 1944 Production GoalsReturns from Potatoes, white
Commodity

A. Historical and Present Prices Per Unit (bushel)

(1)	January 1935 - December 1939 average	\$.753
(2)	1941 average	\$.808
(3)	1942 average	\$1.160
(4)	July 1943 average	\$1.67

B. Price Ceiling Provisions

(1)	Parity or comparable price July 1943	\$1.21
* (2)	Highest price January 1 - September 15, 1943	\$1.147
(3)	Price ceiling July 1943	\$1.40

C. Price Support Provisions

(1)	Present support price (1943)	$\frac{2}{3}$ \$1.06
(2)	Present additional inducements	$\frac{3}{3}$ \$.05
(3)	Total gross returns	\$
(4)	90 percent of parity	\$1.09

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1)	July 1943 Index Price of Commodity	
	Base 1919-29	147
(2)	July 1943 Index Price of Commodity	
	Base 1935-39	222
(3)	July 1943 Index Commodities Used in Production	
	Base 1919-29	110
(4)	July 1943 Index Commodities Used in Production	
	Base 1935-39	129
* (5)	July 1943 Index of Farm Wages	
	Base 1935-39	225
(6)	Unit returns to equal return from competing crops.	Parity Price

E. Suggested 1944 Price

(1)	Suggested average price to farmers	Parity Price
(2)	Suggested inducements (average value per unit)	—
(3)	Total suggested return per unit	Parity Price

* Seasonally adjusted

- /1. Farm price derived from ceiling prices at shipping points by States and by months.
- /2. Support prices have been announced by States, months, and varieties. These prices were expected to average at least 92 percent of the estimated parity price of \$1.15 per bushel for June 1943.
- /3. There is an incentive payment of 50 cents per bushel on the normal yield of the planted acreage from 90 to 110 percent of the farm goal.

Sweet Potatoes: Requirements and Production - Table 11
Requirements 31,100,000 bushels 1/
Goal Production 37,650,000 bushels

State	Production					Av. yield		1944 goal	
	1937-41		1943		1937-41		Assumed		
	average		goal		planted		yield		
	1	2	3	4	5	6	7	8	
1,000 bushels									
Bushels									
1,000 bu.									
Acres									
1,000 acres									
N. J.	1,959	2,720	2,820	2,080	128	140	2,520	18	
N. E.	1,959	2,720	2,820	2,080	105	105	2,520	18	
Ind.	233	143	270	220	91	91	210	2	
Ill.	295	342	425	360	93	93	364	4	
Iowa	224	190	243	194	100	95	186	2	
Mo.	782	355	1,245	855	124	135	855	9	
N. Cent.	1,584	1,530	2,183	1,629	146	150	1,615	17	
Del.	398	495	488	405	116	120	405	3	
Md.	1,142	1,440	1,620	1,530	100	105	1,500	10	
Va.	3,769	3,875	4,440	4,420	86	87	4,080	34	
N. C.	7,876	8,510	8,640	9,350	92	92	10,500	100	
Ky.	1,326	1,656	2,075	2,160	85	90	2,262	26	
Tenn.	4,333	3,600	5,400	4,860	72	80	5,520	60	
E. Cent.	18,844	19,576	22,663	22,725	85	90	24,267	233	
S. C.	4,642	5,890	6,150	7,125	72	80	7,650	85	
Ge.	7,462	8,000	10,080	9,875	65	70	9,680	121	
Fla.	1,176	1,190	1,650	1,820	73	80	2,100	30	
Ala.	5,759	6,006	7,800	8,500	83	86	8,560	107	
Miss.	5,708	6,460	8,360	7,920	81	81	7,998	93	
Ark.	2,139	1,700	2,520	2,520	70	70	2,835	35	
La.	5,674	5,808	8,165	7,973	76	76	8,750	125	
Okla.	820	800	1,134	1,040	75	80	1,140	15	
Tex.	4,122	3,825	6,650	7,740	112	125	8,000	100	
So.	38,502	39,679	52,509	54,513	119	120	56,713	711	
Kan.	336	375	445	360	84.3	87.7	375	3	
Calif.	1,376	1,500	2,160	1,680	84.3	87.7	2,160	18	
West.	1,712	1,875	2,605	2,040	84.3	87.7	2,415	21	
U. S.	62,601	65,380	82,780	82,987	84.3	87.7	87,650	1,000	

1/ Includes an allowance for seed; excludes shrinkage, feed, and waste.

Sweet Potatoes: Suggested 1944 Planted Acreage with Comparisons - Table III

State	1937-41 average planted	1942 planted	1943 goal	1943 indicated	1944 production capacity	Per Cent 1944 Goal of:			1944 goal
						1944 capacity	1942 indicated	1943 indicated	
	1	2	3	4	5	6	7	8	9
	Thousands of acres					Percent			
									(000)
N. J.	15	16	20	16	20.0	90	112	112	18
N. E.	15	16	20	16	20.0	90	112	112	18
Ind.	2.7	1	3	2	1.4	143	200	100	2
Ill.	3	3	5	4	5.0	80	133	100	4
Iowa	2	2	3	2	2.0	100	100	100	2
Mo.	8	9	15	9	9.0	100	100	100	9
N. Cent.	15.7	15	26	17	17.4	97.7	113	100	17
Del.	3	3	4	3	5.0	60	100	100	3
Md.	8	8	12	9	10.0	100	125	111	10
Va.	33	31	40	34	34.0	100	110	100	34
N. C.	79	74	90	85	105.2	95	135	118	100
Ky.	15	18	25	24	26.0	100	144	108	26
Tenn.	47	40	60	54	66.5	90	150	111	60
E. Cent.	185	174	231	209	246.7	94.4	134	111	233
S. C.	54	62	75	75	95.0	89	137	113	85
Ga.	104	100	140	125	121.0	100	121	97	121
Fla.	18	17	25	26	35.0	86	176	115	30
Ala.	78	77	100	100	114.9	93	139	107	197
Miss.	68	68	95	88	93.2	99.8	137	107	93
Ark.	27	20	35	28	47.5	74	175	125	35
La.	95	88	115	119	125.0	100	142	105	125
Okla.	11	10	18	13	24.0	62.5	150	116	15
Tex.	56	46	95	90	129.0	77.5	217	111	100
South.	511	488	698	664	784.6	90.6	146	107	711
Kan.	3	2	5	3	4.0	75.0	150	100	3
Calif.	12	12	20	14	18.1	99.4	150	129	18
West.	15	14	25	17	22.1	95.0	150	124	21
U. S.	740.9	708	1,000	923	1,090.8	91.7	141	108	1,000

Table 5

Price Data For 1944 Production Goals

Returns from Sweetpotatoes
Commodity

A. Historical and Present Prices Per Unit (bushel)

(1)	January 1935 - December 1939 average	¢ .814
(2)	1941 average	¢ .971
(3)	1942 average	¢ 1.436
(4)	July 1943 average	¢ 2.67

B. Price Ceiling Provisions

(1)	Parity or comparable price July 1943	¢ 1.45
* (2)	Highest price January 1 - September 15, 1943	¢ 1.205
(3)	Price ceiling July 1943	None

C. Price Support provisions

(1)	Present support price	¢ 1.34
(2)	Present additional inducements	¢ —
(3)	Total gross returns	¢ —
(4)	90 percent of parity	¢ 1.30

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1)	July 1943 Index Price of Commodity	
	Base 1909-14	304
(2)	July 1943 Index Price of Commodity	
	Base 1935-39	328
(3)	July 1943 Index Commodities Used in Production	
	Base 1909-14	164
(4)	July 1943 Index Commodities Used in Production	
	Base 1935-39	129
* (5)	July 1943 Index of Farm Wages	
	Base 1935-39	225
(6)	Unit returns to equal return from competing crops	Parity Price

E. Suggested 1944 Price

(1)	Suggested average price to farmers	Parity Price
(2)	Suggested inducements (average value per unit)	—
(3)	Total suggested return per unit	Parity Price

* Seasonally adjusted

1. Support prices have been announced which vary by periods, they are expected to average about \$1.34 for the season.

Commodity	Development of requirements														
	Civilian per capita consumption of food (in pounds)			Food requirements				Industrial non-food requirements			Stocks b/				Net total food and industrial non-food requirements to be met out of production (6+9+13-14)
				Civilian	Non-civilian	Total	Civilian	Non-civilian	Total	Beginning of year	End of year			Net increase in stocks	
	Operating	Desired reserve													
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
	</														

POTATOES

Tables I and II - Estimated requirements for 1944 and 1945 - continued

- a/ For starch.
- b/ Carryin and carryout assumed to be the same.
- c/ Excluding seed requirements and waste, amounting to approximately 85 million bushels.
- d/ Revised requirements recently received for Liberated Areas increase the 1944 requirements by approximately 3.4 million bushels, and the 1945 requirements by 2.4 million bushels.

Food Distribution Administration
Requirements and Allocations Control
August 23, 1943

POULTRY

Summary

Production goals for poultry products at approximately the 1943 indicated levels are suggested for 1944. A slight increase in egg production and a small decrease in total poultry production are proposed.

Except for probable shortages of poultry feed in the deficit feed producing sections, no critical difficulties are foreseen which might prevent the attainment of the goals suggested.

Eggs

In order to meet the estimated requirements for eggs in 1944 for civilian and non-civilian uses, it will be necessary to produce about 5 billion dozens or about the same as the probable production in 1943. This is 4.6 percent above the goal set for 1943, 13 percent above the 1942 production, and 40 percent above the 1937-41 average production. This goal makes allowance for 1,400 million dozens for non-civilian use, 200 million dozens for hatching, and leaves 3,400 million dozens, or 318 eggs per capita for civilian use.

With an indicated 11 percent more layers on farms at the beginning of 1944 than of 1943, even with a considerably lower rate of lay, per layer on hand January 1, 1944, the 1944 proposed egg goal should not be difficult of attainment. In order to obtain this production and to conserve vital feed supplies, the two important poultry management practices of continuous culling and full feeding should be emphasized. If the egg-feed price ratio were continued at about this year's level and sufficient feed were available to meet minimum demands, as many as 10 percent more eggs probably could be produced in 1944 than were produced in 1943. The actual outcome, of course, will depend upon the specific policies that are adopted for 1943-44 with respect to feed prices and feed supplies. In view of the anticipated tight feed situation, a goal of 5 billion dozens is recommended. This production would exceed the estimated requirements.

Chickens

A goal of 4 billion pounds, dressed weight, of chickens for meat is again suggested. A larger than usual part of the chicken meat should come from more rigid and continuous culling of the unusually large numbers which will be on farms early in 1944. It is recommended that about 3 percent fewer chickens be raised in farm flocks and that broiler and other specialized commercial production be reduced about 20 percent below the 1943 indicated production. To achieve this poultry meat goal and for laying flock replacement, 900 million farm flock chickens, 90 million non-farm chickens, and 200 million commercial broilers should be raised. The 900 million chickens which should be raised in farm flocks would produce a supply of layers on January 1, 1945 slightly smaller than the number on hand January 1, 1943, but the layers would be more highly selected and therefore capable of maintaining total egg production at not less than the 1943 level. By reducing the number of chickens raised from the 1943 level to the numbers suggested for farm flocks, non-farm flocks, and commercial broilers, a saving of 500,000 tons of feed can be effected.

Turkeys

The recommended turkey goal is 32 million head, or 467 million pounds of turkey meat. The number to be raised is 4 percent less than either the probable 1943 number or the 1942 number, but 4.2 percent above the 1937-41 average. The production in 1943 apparently will be only 86 percent of the goal set a year ago. Feed shortages may hinder attainment of the 1944 turkey goal but this problem will be minimized by the fact that a very large proportion of the turkeys are produced in surplus feed areas.

Table A.- Eggs and Poultry: Summary table of suggested 1944 national farm goals with comparisons

Item	1937-41 average	1942	1943 goal	1943 (Indicated as of July)	1944 capacity	1944 suggested goal	1944 suggested goal as a percentage of 1942
Eggs produced on farms	3,251,742	4,017,750	4,344,704	4,516,749	4,546,120	4,545,000	113
Hens and pullets on farms January 1	376,576	426,226	1/ 455,337	2/ 487,089	---	3/ 540,812	127
Chickens raised on farms	656,464	794,787	872,026	925,652	855,620	4/ 900,000	113
Commercial broilers raised	110,927	204,060	---	248,576	198,529	200,000	98
Turkeys raised	30,723	33,206	38,699	33,176	34,845	32,000	96

1/ Expected number Jan. 1, 1943 on basis of indications in October 1942.

2/ Reported number on Jan. 1, 1943 (B.A.E., March 1943).

3/ Indicated number on Jan. 1, 1944 (B.A.E., July 1943).

4/ See footnote 3, page 10, and first paragraph page 17 under title "chickens"

1944 and 1945 Requirements for Poultry and Eggs

Two tables are presented showing estimated requirements for eggs and poultry.

Civilian requirements presented in Tables I and II are based largely on nutritional needs with respect to prospective supplies of other foods, but give some consideration to other factors such as non-civilian requirements, production capacity, and storage facilities. Special allowance was not made for inequities of distribution resulting from shorter supplies for civilians.

The per capita rate of consumption of eggs for 1944, given in Table I, is about the same as the average consumption during 1935-39, but considerably less than the present rate of consumption. Such a supply of eggs probably would require rationing to provide sufficient eggs for military and lend-lease requirements. The non-civilian requirements for dried eggs are in excess of the present rate of production, and probably in excess of the drying capacity. Price considerations have precluded drying at maximum capacity during 1943 and may be a retarding factor again in 1944.

Table Ia indicates the 1944 requirements of eggs and poultry at levels more nearly equal to rates of civilian egg and poultry consumption in 1943. With the suggested goal production of 5 billion dozens and if non-civilians should obtain 280 million instead of 350 million pounds of dried eggs in 1944, civilian consumption of eggs could be about 42 pounds per capita, or only slightly less than estimated for 1943. Chicken consumption would be at the rate of 27.7 pounds per capita in 1944, and turkeys at 3 pounds per capita.

Table III shows the production requirements on the farm basis with a comparison of the requirements as given in Table I and the goals suggested. Besides the production of 4,545 million dozen eggs on farms, to produce 4 billion pounds of chicken meat, dressed weight, will require the slaughter of 900 million farm chickens, 90 million non-farm chickens, and 200 million broilers. The total pounds of chicken and turkey meat suggested for 1944 is approximately the same as the quantity produced in 1943.

Production Capacity

Nature of the Estimates

Studies of maximum wartime agricultural production capacity have recently been completed in each of the 48 States. These studies were carried out by the Land-Grant Colleges in cooperation with the Bureau of Agricultural Economics and other Government agencies. The studies called for two separate sets of estimates: (1) Maximum wartime capacity - the annual maximum production of farm products that could be attained during the war and maintained for the duration of the emergency, and (2) 1944 wartime capacity - the maximum production that can be attained in 1944 under assumed conditions with respect to the availability of farm labor, machinery, supplies, and processing facilities.

The estimates of maximum wartime capacity assume that farm labor, machinery, equipment, fertilizer and marketing and processing facilities will be made available in adequate quantities. The estimates of 1944 wartime capacity assume that the supply of farm labor will be no larger than in 1943 (except for some additional seasonal workers) but that some increase in supplies of fertilizer, machinery, and other materials will be made available as indicated by the current outlook. Both sets of estimates assume that the economic incentives necessary to bring about capacity production will be established.

The estimates of wartime capacity production for the individual farm products represent the quantities that would be obtainable simultaneously in a balanced agricultural pattern. They involve some shifts in production to products having a relatively high output of essential food nutrients per unit of resources used, or to products having indispensable non-food value, away from enterprises yielding a relatively lower output per unit of resources used. The State committees were provided with preliminary analyses dealing with probable future national needs for food and other products for use as a general guide in making their estimates.

POULTRY AND EGGS

CONFIDENTIAL

Tables I and II - Estimated requirements for 1944 and 1945
(In specified units)

Commodity	Development of requirements in millions of units															
	Civilian per capita consumption of food (in pounds)			Unit	Food requirements			Industrial non-food requirements			Stocks				Imports	Net total food and industrial non-food requirements to be met out of production (7+10+14-15)
					Civilian	Non-civilian	Total	Civilian	Non-civilian	Total	Beginning of year	End of year		Net increase in stocks		
	Operating	Desired reserve														
	1935-1939	1942	Estimated requirements	4	5	6	7	8	9	10	11	12	13	14	15	16
	1	2	3													
Total eggs	37.5	40.1	37.0	Million dozen	a/3, 162.2	1,627.1	4,789.3	-	b/ 200	75.0	75.0	0	0	4	4,985.3	
Dried whole eggs	-	-	-	Million pounds	-	427.7	427.7	-	-	22.7	25.0	0	2.3	0	430.0	
Chickens	18.0	21.9	26.0	Mill. lbs., dr. wt.	3,333.2	442.6	3,775.8	-	-	225.0	225.0	0	0	0	3,775.8	
Turkeys	2.7	3.8	2.5	Mill. lbs., dr. wt.	320.5	88.3	408.8	-	-	140.0	150.0	0	10.0	0	418.8	
1944																
Total eggs	37.5	40.1	32.0	Million dozen	a/2, 746.0	1,590.8	4,336.8	-	b/ 190	75.0	75.0	0	0	0	4,526.8	
Dried whole eggs	-	-	-	Million pounds	-	396.8	396.8	-	-	25.0	25.0	0	0	0	396.8	
Chickens	18.0	21.9	22.0	Mill. lbs., dr. wt.	2,831.4	437.4	3,268.8	-	-	225.0	225.0	0	0	0	3,268.8	
Turkeys	2.7	3.8	2.0	Mill. lbs., dr. wt.	257.4	61.2	318.6	-	-	150.0	150.0	0	0	0	318.6	
1945																

a/ This is the request for eggs for civilian use based on the anticipated feed situation and desirability of diverting feed to milk production. Should supplies of eggs available to civilians be greater than requested, the civilian market undoubtedly will consume them in even larger quantities than in 1943.

b/ Eggs for hatching.

Table Ia - Estimated Disposition of Eggs, Chickens, and Turkeys, Assuming Production at Goal Levels, 1944*

Commodity	Supplies : per capita : based on : goals 1/ : (pounds)	Unit	Food Supplies		Estimated : production : assuming : goals are : reached
			Civilian	Non-civilian	Total
	3	4	5	6	7
					16
Total eggs	39.8	Mil. doz.	3,400	1,400	4,800
Dried whole eggs	-	Mil. lbs.	-	350	350
					352.3
Chickens	27.7	Mil.lbs.dr.wt.	3,557.4	442.6	4,000
Turkeys	3.0	" " "	378.7	88.3	467

*Note: Column numbers correspond to those in Tables I and II.

1/ Assuming population for mid-1944 at 128.2 million, including non-civillians on leave.

2/ Including 200 million dozens for hatching.

3/ Including 2.3 million pounds net increase in stocks.

Table III - Total 1944 Production Requirements; Farm Basis

Commodity	: Net total	:	:	Production units (goal basis)	
	: food and	:	:		
	: industrial	:	:		
	: non-food	:	Suggested		
	: requirements	:	goal		
	: to be met	:	:		
	: out of pro-	:	:		
	: duction	:	:		
	: <u>Mil. doz.</u>	:	<u>Mil. doz.</u>		
Eggs:		:			
Farm prod.		:	4,545		
Non-farm prod.		:	455		
Total	4,985	:	5,000		
	<u>Mil. lbs.</u>	:	<u>Mil. lbs.</u>	<u>Mil. lbs.</u>	No. of birds
Chickens:	<u>dr. wt.</u>	:	<u>dr. wt.</u>	<u>live wt.</u>	(Millions)
Farm prod.		:	3,156	3,600	900
Non-farm prod.		:	316	360	90
Broilers and commercial		:	528	600	200
Total	3,776	:	4,000	4,560	1,190
Turkeys	419	:	467	522	32

Egg Production

The State reports on agricultural production capacity indicate that in about one-half of the States there will be resources available for a slight to moderate increase in egg production over the expected record output of 1943. The other States report 1944 egg production capacity at about the same or a lower level than the indicated production of 1943. The States in each of these "1944 capacity groups" are found fairly well distributed throughout the Nation. However a majority of the States in the feed deficit areas are pessimistic about the quantity of the national feed supply which can be allotted to egg production in 1944 and assume that some reduction below 1943 levels will be necessary to meet feed requirements for maintaining milk production. On the other hand, in many feed-surplus States it is assumed that national feed supplies will be adequate for an expansion of egg production in 1944. In making the tentative distribution of 1944 goals, allowance is made for these differences in area approach.

The principal factors limiting production in 1944 will be the available feed supply and housing facilities for the laying flocks. The effect on egg production per hen of overcrowding winter laying quarters was generally recognized.

Present indications are for the number of hens and pullets on farms January 1, 1944 to reach 540,812,000 head, 27 percent more than the number on farms two years earlier. To attain the suggested goal of 4,545,000,000 dozen eggs from farm flocks in 1944, the average production per hen and pullet on hand January 1 would be 101 eggs. It was assumed that much closer culling of farm flocks will be practice in 1944 than in 1943, because of increasing tightness of the feed situation. Much closer than normal culling is recommended in order to obtain larger production of eggs per unit of feed fed. The indicated average production in 1943 per hen and pullet on hand January 1 of this year is 111 eggs. The rate of lay based on average numbers of layers on hand during the year can be expected to be as high in 1944 as in 1943, if more severe culling is practice in 1944 than in 1943.

Chickens Raised

The 1944 capacity for chickens raised was estimated at less than the 1943 numbers raised, except in a few States. It was generally assumed that egg production is a more efficient use of feed and other resources than is production of chickens for meat, and therefore if there will not be enough feed for maintaining both at the high level of 1943, preference should be given to egg production.

Commercial Broiler Production

The State reports indicate that broiler production in 1944 should be at a lower level than that of 1943. Expansion of the broiler industry in recent years has been most rapid in feed deficit States. The expected difficulty of obtaining feed in these areas in 1944 is likely to have a deterrent effect on broiler production.

Turkey Production

The 1944 national capacity for turkeys raised was estimated at only slightly above the number raised in 1942. Twenty-nine States reported their capacity within 6 percent of their 1942 figure. Only 15 States reported capacity for raising 10 percent or more turkeys than in 1942. Texas and Minnesota, two of the largest turkey producing States, estimated their 1944 capacity at 101 percent of the 1942 level. The 1944 capacity in California is estimated at 119 percent of the number raised in 1942.

In an uncertain feed situation it becomes more risky to go heavily into turkey production than into the raising of chickens for meat, as turkeys require a much longer feeding period before reaching market weight. However, it should be recognized that a large proportion of the turkeys in this country are raised by skillful producers in feed surplus areas, and are efficient users of feed.

Table IV-1-Eggs: Production on farms, 1944 suggested goal with comparisons

State and region	1937-41	1942	1943	1944	1944	Percentage	
	average	1/	indicated	capacity	suggested	1944 goal is of	
			2/	3/	goal	1942	1943
	1,000	1,000	1,000	1,000	1,000	Percent	Percent
	dozens	dozens	dozens	dozens	dozens		
Maine	21,583	27,583	31,667	30,000	30,000	109	95
N. H.	19,167	21,417	23,833	23,300	24,000	112	101
Vt.	9,500	11,500	13,250	12,400	13,000	113	98
Mass.	43,667	56,417	61,750	70,000	62,000	110	100
R. I.	4,833	6,083	6,333	7,800	6,200	102	98
Conn.	28,667	33,750	35,833	39,000	37,000	110	103
N. Y.	142,500	157,417	169,583	162,000	175,000	111	103
N. J.	62,083	76,083	76,417	76,083	78,000	103	102
Pa.	173,333	195,500	214,917	207,275	216,000	110	101
N. E.	505,333	585,750	634,583	627,858	641,200	109	101
Ohio	182,833	211,084	228,083	230,000	230,000	109	101
Ind.	124,250	145,000	165,833	160,000	165,000	114	99
Ill.	163,750	195,500	223,417	245,700	232,000	119	104
Mich.	106,500	118,500	130,583	118,000	130,000	110	100
Wis.	139,661	171,000	187,417	186,000	196,000	115	105
Minn.	158,250	235,500	285,667	288,000	288,000	122	101
Iowa	220,167	301,083	326,833	342,000	338,000	112	103
Mo.	164,000	211,083	242,000	225,000	237,000	112	98
S. Dak.	46,167	72,917	82,500	88,080	85,000	117	103
Nebr.	91,250	134,250	156,000	169,542	163,000	121	104
N. Cent.	1,396,828	1,795,917	2,028,333	2,052,322	2,064,000	115	102
Del.	9,250	9,917	10,333	11,123	10,000	101	97
Md.	30,417	33,333	34,583	33,333	35,000	105	101
Ve.	70,833	81,250	84,667	80,137	84,000	103	99
W. Va.	34,583	40,083	44,500	45,300	44,000	110	99
N. C.	55,583	69,333	82,500	101,748	86,000	124	104
Ky.	70,750	93,667	107,667	113,230	108,000	115	100
Tenn.	63,250	80,834	97,583	87,730	93,000	115	95
E. Cent.	334,666	408,417	461,833	472,601	460,000	113	100
S. C.	20,833	24,917	27,000	30,113	27,000	108	100
Ga.	42,167	51,750	57,500	58,707	58,000	112	101
Fla.	16,667	17,583	19,000	18,934	19,000	108	100
Ala.	42,667	52,750	63,750	61,300	61,000	116	96
Miss.	39,833	45,500	52,500	52,325	52,000	114	99
Ark.	48,333	58,000	64,000	63,610	63,000	109	98
La.	24,333	29,083	32,250	32,879	33,000	113	102
Okla.	81,500	112,417	129,500	137,755	133,000	118	103
Tex.	186,500	233,917	271,833	287,548	272,000	116	100
South	502,833	625,917	717,333	743,171	718,000	115	100
N. Dak.	27,916	44,500	51,750	44,583	52,000	117	100
Kans.	121,833	159,333	183,083	190,964	184,000	115	100
Mont.	15,333	19,667	21,083	19,973	21,000	107	100
Idaho	19,500	22,083	24,750	27,518	25,000	113	101
Wyo.	6,167	7,583	8,750	9,853	8,700	115	99
Colo.	26,250	34,917	39,250	33,200	39,000	112	99
N. Mex.	8,250	9,750	12,250	11,700	12,000	123	98
Ariz.	5,500	6,000	6,500	6,850	6,800	113	105
Utah	23,750	25,000	27,667	28,600	28,000	112	101
Nev.	2,500	2,833	2,917	3,100	2,800	99	96
Wash.	69,583	72,167	78,333	66,810	76,000	105	97
Oreg.	36,083	38,833	41,667	40,350	40,000	103	96
Calif.	149,417	159,083	176,667	166,667	167,000	105	95
West	512,082	601,749	674,667	650,168	662,300	110	98
U. S.	3,251,742	4,017,750	4,516,749	4,546,120	4,545,500	113	101

1/ "Farm Production and Income, Chickens and Eggs, 1941-42", B.A.E., March 1943.

2/ B.A.E. indications as of July 1943 prepared in Washington, D. C. from unpublished data.

3/ For explanation of estimates of "capacity" see page 3 of this report.

Table IV-2- Hens and Pullets: Number on farms January 1, 1944 indicated with comparisons

State and Region	1937-41 average	1942 1/	1943 1/	1944 Indicated 2/	Percentage 1944 Indicated is of	
					1942	1943
	Thousands	Thousands	Thousands	Thousands	Percent	Percent
Maine	1,777	2,143	2,475	2,624	122	106
N. H.	1,611	1,745	1,926	2,157	124	112
Vt.	787	921	1,088	1,175	128	108
Mass.	3,514	4,224	4,851	5,191	123	107
R. I.	385	473	511	552	117	108
Conn.	2,378	2,787	3,186	3,409	122	107
N. Y.	13,160	13,572	15,383	16,921	125	110
N. J.	5,332	6,455	7,533	8,060	125	107
Pa.	17,653	18,501	20,788	23,283	126	112
N. E.	46,597	50,821	57,741	63,372	125	110
Ohio	19,554	20,674	22,541	25,246	122	112
Ind.	13,679	14,354	16,191	18,296	127	113
Ill.	20,264	21,447	24,617	28,556	133	116
Mich.	11,524	12,083	13,171	15,805	131	120
Wis.	14,292	16,103	17,737	20,752	129	117
Minn.	18,145	22,885	28,029	32,233	141	115
Iowa	28,665	33,724	37,892	42,439	126	112
Mo.	19,772	23,090	26,322	28,954	125	110
S. Dak.	6,207	8,364	10,106	10,914	130	108
Nebr.	11,406	13,814	17,449	19,194	139	110
N. Cent.	163,508	186,538	214,055	242,389	130	113
Del.	943	1,038	1,056	1,214	117	115
Md.	3,324	3,499	3,753	4,241	121	113
Va.	8,281	8,727	9,338	10,085	116	108
W. Va.	3,903	4,023	4,534	4,806	119	106
N. C.	8,108	9,583	11,174	12,738	133	114
Ky.	9,716	10,756	12,835	13,605	126	106
Tenn.	9,437	10,081	11,979	13,057	130	109
E. Cent.	43,712	47,707	54,669	59,746	125	109
S. C.	3,340	3,933	4,222	4,644	128	110
Ga.	6,610	7,630	8,562	9,504	125	111
Fla.	2,087	2,162	2,326	2,605	120	112
Ala.	6,422	7,525	8,337	8,754	116	105
Miss.	6,608	7,233	8,316	9,148	126	110
Ark.	7,340	8,355	9,497	9,877	118	104
La.	4,047	4,735	5,225	5,695	120	109
Okla.	10,179	12,305	14,596	16,348	133	112
Tex.	23,616	28,307	33,331	35,997	127	108
South	70,249	82,185	94,412	102,572	125	109
N. Dak.	3,658	5,063	6,473	6,926	137	107
Kans.	13,586	15,932	18,806	20,687	130	110
Mont.	1,775	2,110	2,437	2,705	128	111
Idaho	2,141	2,453	2,636	2,952	120	112
Wyo.	723	785	903	1,002	128	111
Colo.	3,020	3,593	4,205	4,794	133	114
N. Mex.	997	1,114	1,418	1,461	131	103
Ariz.	571	598	674	768	128	114
Utah	2,207	2,341	2,483	2,930	125	118
Nev.	240	262	264	304	116	115
Wash.	6,009	6,355	6,550	7,532	119	115
Oreg.	3,286	3,435	3,668	4,035	117	110
Calif.	14,297	14,934	15,695	16,637	111	106
West	52,510	58,975	66,212	72,733	123	110
U.S.	376,576	426,226	487,089	540,812	127	111

1/ "Farm Production and Income, Chickens and Eggs, 1941-42," B.A.E., March 1943.
2/ B.A.E. indications as of July 1943.

3-17-43

TABLE IV-3-CHICKENS: NUMBER RAISED ON FARMS, 1944 SUGGESTED GOAL WITH COMPARISONS

State and region	1937-41 average	1942 1/	1943 indi- cated 2/	1944 capacity 3/	1944 suggested goal 4/	Percentage 1944 goal is of	
						1942	1943 indicated
						Percent	Percent
Maine	3,759	4,661	5,267	5,000	5,000	107	95
N. H.	3,402	3,540	4,425	3,540	4,200	119	95
Vt.	1,314	1,651	1,932	1,650	1,800	109	93
Mass.	7,412	9,293	10,687	10,000	10,000	108	94
R. I.	314	908	1,053	1,200	1,000	110	95
Conn.	4,609	4,824	5,548	4,600	5,400	112	97
N. Y.	19,377	21,696	26,686	20,000	25,000	115	94
N. J.	9,799	10,310	11,753	12,000	11,000	107	94
Pa.	23,507	31,501	39,376	34,000	37,000	117	94
N.E.	78,993	83,384	106,727	91,990	100,400	114	94
Ohio	30,704	33,592	38,631	34,000	38,000	113	98
Ind.	27,444	31,489	36,842	29,000	36,000	114	98
Ill.	35,103	40,448	48,538	48,000	48,000	119	99
Mich.	18,561	19,872	24,840	20,000	22,000	111	89
Wis.	19,355	24,166	29,483	28,000	28,000	116	95
Minn.	31,891	44,695	53,634	44,800	51,000	114	95
Iowa	48,834	60,281	69,926	65,000	69,000	114	99
Mo.	32,523	38,266	43,241	38,000	43,000	112	99
S. Dak.	11,701	19,114	21,217	21,000	21,000	110	99
Nebr.	24,888	34,740	39,256	40,113	40,000	115	102
N.Cent.	281,004	346,663	405,608	367,913	396,000	114	98
Del.	2,135	2,597	3,246	3,246	3,200	123	99
Md.	7,036	7,822	9,465	8,000	9,100	116	96
Va.	16,162	17,923	20,259	17,923	18,000	100	89
W. Va.	5,413	5,879	6,467	5,127	5,600	95	87
N. C.	18,305	21,505	26,666	34,828	30,000	140	113
Ky.	20,222	25,034	27,592	27,592	28,000	112	101
Tenn.	15,836	18,399	20,975	19,870	20,000	109	95
E.Cent.	85,109	99,214	114,670	116,591	113,900	115	99
S. C.	8,340	9,722	11,375	11,654	12,000	123	105
Ga.	13,957	15,750	18,585	17,833	18,000	114	97
Fla.	4,360	4,847	5,816	4,994	5,300	109	91
Ala.	12,137	15,431	16,665	15,000	16,000	104	96
Miss.	13,239	16,431	19,060	19,885	20,000	122	105
Ark.	13,547	16,045	17,008	17,440	17,000	106	100
La.	8,441	10,097	11,612	10,670	11,000	109	95
Okla.	17,350	21,618	25,725	26,133	26,000	120	101
Tex.	35,268	46,058	52,046	47,550	51,000	111	98
South	126,639	155,999	177,892	171,159	176,300	113	99
N. Dak.	7,097	12,592	13,725	10,000	12,000	95	87
Kans.	24,745	31,194	35,249	35,000	35,000	112	95
Mont.	3,470	4,647	5,576	4,445	5,300	114	95
Idaho	3,607	4,303	5,250	4,330	4,700	109	90
Wyo.	1,384	1,894	2,273	2,146	2,200	116	97
Colo.	5,580	6,599	8,249	6,743	7,000	106	85
N. Mex.	1,396	1,556	1,634	1,556	1,600	103	98
Ariz.	935	991	1,239	1,020	1,100	111	89
Utah	2,670	3,054	4,031	3,450	3,600	118	89
Nev.	395	458	582	519	500	109	86
Wash.	7,777	8,509	10,392	7,833	9,500	112	87
Oreg.	4,634	5,021	5,975	5,925	5,900	118	99
Calif.	21,029	23,709	26,030	25,000	25,000	105	96
West	84,719	104,527	120,755	107,967	113,400	108	94
U. S.	656,464	794,787	925,652	855,620	900,000	113	97

1/ "Farm Production and Income, Chickens and Eggs, 1941-42," B.A.E. March 1943.

2/ BAE indications as of July 1943 prepared in Washington, D. C., published July 1943. 3/ For explanation of estimates of "capacity" see page 3 of this report.

4/ Attainment of the 1944 suggested goal, although it is in excess of the indicated production capacity, is considered possible because: (1) A continuous and rigorous culling program is being advocated by educational agencies; (2) indications are that in 1943 about 26 million chickens more than the 1944 suggested goal will be raised, and (3) it is assumed that poultry producers will be given some assurance relative to feed supplies and that steps will be taken to provide sufficient feed to the deficient feed producing areas to maintain the production of eggs and poultry on farms.

Table IV-4-Broilers: Commercial production, 1944 suggested goal with comparisons

State and region	1937-41 average	1942 1/	1943 indicated 2/	1944 capacity 3/	1944 suggested goal	Percentage	
						1944 goal is of	
						1942	1943 indicated
	Thousands	Thousands	Thousands	Thousands	Thousands	Percent	Percent
Maine	418	660	924	600	675	102	73
N. H.	872	1,150	1,610	1,200	1,180	103	73
Vt.	468	940	1,175	900	935	99	80
Mass.	1,614	2,340	2,925	2,100	2,327	99	80
R. I.	108	170	212	200	169	99	80
Conn.	4,780	8,910	11,583	8,000	9,056	102	78
N. Y.	2,710	4,500	5,850	4,000	4,574	102	78
N. J.	1,069	1,860	2,232	1,500	1,808	97	81
Pa.	2,620	3,900	5,070	3,900	3,964	102	78
N. E.	14,659	24,430	31,581	22,400	24,688	101	78
Ohio	2,770	3,300	4,125	3,300	3,281	99	80
Ind.	3,260	5,060	6,325	5,500	5,031	99	80
Ill.	3,440	6,000	8,100	6,000	6,231	104	77
Mich.	480	525	682	500	533	102	78
Wis.	1,010	1,600	2,000	1,900	1,591	99	80
Minn.	---	---	---	---	---	---	---
Iowa	---	---	---	---	---	---	---
Mo.	1,820	2,450	2,818	2,000	2,393	98	85
S. Dak.	---	---	---	---	---	---	---
Nebr.	---	---	---	---	---	---	---
N. Cent.	12,780	18,935	24,050	19,200	19,060	101	79
Del.	28,000	54,000	58,320	54,000	49,625	92	85
Md.	8,340	18,000	21,060	16,000	17,255	96	82
Va.	9,600	17,500	19,250	14,000	16,235	93	84
W. Va.	1,620	5,600	8,120	4,000	6,063	108	75
N. C.	4,012	8,000	11,600	10,000	8,661	108	75
Ky.	730	1,150	1,438	1,000	1,144	99	80
Tenn.	1,530	2,250	2,812	2,313	2,237	99	80
E. Cent.	53,832	106,500	122,600	101,318	101,220	95	83
S. C.	1,660	3,250	3,738	2,600	3,088	95	83
Ga.	2,700	10,000	16,500	10,000	11,500	115	70
Fla.	2,260	4,375	5,688	5,000	4,447	102	78
Ala.	---	---	---	---	---	---	---
Miss.	560	1,385	1,731	1,400	1,377	99	80
Ark.	7,940	11,000	11,550	11,840	10,175	92	88
La.	530	1,100	1,320	1,000	1,069	97	81
Okla.	1,640	2,500	3,125	2,500	2,486	99	80
Texas	5,000	9,500	12,350	9,500	9,656	102	78
South	22,290	43,110	56,002	43,840	43,798	102	78
N. Dak.	---	---	---	---	---	---	---
Kans.	740	900	1,035	850	855	95	83
Mont.	---	---	---	---	---	---	---
Idaho	---	---	---	---	---	---	---
Wyo.	---	---	---	---	---	---	---
Colo.	---	---	---	---	---	---	---
N. Mex.	---	---	---	---	---	---	---
Ariz.	286	610	824	610	634	104	77
Utah	---	---	---	---	---	---	---
Nev.	---	---	---	---	---	---	---
Wash.	680	1,050	1,418	1,011	1,091	104	77
Oreg.	280	325	406	300	323	99	80
Calif.	5,380	8,200	10,660	9,000	8,331	102	78
West	7,366	11,085	14,343	11,771	11,234	101	78
U. S.	110,927	204,060	248,576	198,529	200,000	98	80

- 1/ "Farm Production and Income, Chickens and Eggs, 1941-42," B.A.E., March 1943.
2/ Highly tentative estimate based on preliminary information for only a few States.
Production may be much larger unless feed supply situation deteriorates considerably.
3/ For explanation of estimates of "capacity" see page 3 of this report.

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Table IV-5-Turkeys: Number raised on farms, 1944 suggested goal with comparisons

State and Region	1937-41	1942	1943	1944	1944	Percentage	
	average	1/ :	Indicated 2/ :	capacity 3/ :	Suggested goal	1944 goal is of	1943
	: :	: :	: :	: :	: :	1942 :	Indicated :
	Thousands	Thousands	Thousands	Thousands	Thousands	Percent	Percent
Maine	46	48	43	50	42	88	98
N. H.	55	69	64	72	62	90	97
Vt.	127	153	161	170	148	97	92
Mass.	216	240	216	300	210	88	97
R. I.	22	25	26	30	24	96	92
Conn.	95	114	117	120	111	97	95
N. Y.	372	420	386	420	371	88	96
N. J.	127	138	166	138	134	97	81
Pa.	739	1,020	1,071	1,300	988	97	92
N. E.	1,799	2,227	2,250	2,600	2,090	94	93
Ohio	760	896	806	950	822	92	102
Ind.	381	394	453	365	412	105	91
Ill.	510	662	609	675	621	94	102
Mich.	463	472	519	475	493	104	95
Wis.	400	504	554	500	526	104	95
Minn.	2,642	3,207	2,983	3,245	2,983	93	100
Iowa	1,581	1,729	1,867	1,700	1,811	105	97
Mo.	1,352	1,359	1,332	1,320	1,292	95	97
S. Dak.	1,106	950	712	1,105	762	80	107
Nebr.	891	1,260	1,260	1,289	1,222	97	97
N. Cent.	10,086	11,433	11,095	11,624	10,944	96	99
Del.	111	113	90	127	85	75	94
Md.	403	405	405	415	380	94	94
Va.	785	902	857	805	831	92	97
W. Va.	218	270	235	270	235	87	100
N. C.	230	268	255	362	240	90	94
Ky.	312	310	254	310	272	88	107
Tenn.	200	196	196	195	190	97	97
E. Cent.	2,259	2,464	2,292	2,484	2,233	91	97
S. C.	144	155	178	180	162	105	91
Ga.	113	140	168	141	146	104	87
Fla.	113	115	120	138	110	96	92
Ala.	131	170	162	185	157	92	97
Miss.	123	143	124	144	126	88	102
Ark.	118	140	126	150	121	86	96
La.	65	61	67	81	65	107	97
Okla.	1,506	1,122	954	1,372	973	87	102
Tex.	4,034	3,724	3,836	3,776	3,529	95	92
South	6,347	5,770	5,735	6,167	5,389	93	94
N. Dak.	1,424	1,212	788	1,250	906	75	115
Kans.	1,082	1,064	958	1,000	977	92	102
Mont.	265	276	246	270	261	95	106
Idaho	230	273	232	253	246	90	106
Wyo.	216	225	202	176	196	87	97
Colo.	858	888	861	944	878	99	102
N. Mex.	63	55	55	61	53	96	96
Ariz.	71	81	93	100	90	111	97
Utah	739	1,166	1,341	1,100	1,234	106	92
Nev.	51	25	34	48	31	124	91
Wash.	683	1,096	1,206	1,033	1,110	101	92
Oreg.	1,579	1,812	2,084	1,985	1,917	106	92
Calif.	2,971	3,139	3,704	3,750	3,445	110	93
West	10,232	11,312	11,804	11,970	11,344	100	96
U. S.	30,723	33,206	33,176	34,845	32,000	96	96

1/ "Farm Production and Income from Turkeys, 1941-42," B.A.E., April 1943.

(Data for a few States have been revised since April 1943).

2/ B.A.E. indications as of August 1, 1943.

3/ For explanation of estimates of "capacity" see page 3 of this report.

Suggested Goals

Eggs

The suggested egg goal for farm production in 1944 is 4,545 million dozens, the same as the indicated 1944 wartime capacity. Non-farm egg production will add 455 million dozens, making a total of 5 billion dozens. The goal calls for an increase of less than one percent over the indicated 1943 production, but 40 percent above the 1937-41 average. It is 13 percent above the 1942 volume and 4 percent above the 1943 goal.

Although the proposed goal would allow an estimated per capita consumption of only 318 eggs in 1944, after making allowance for 1,400 million dozens for non-civilian use and 200 million dozens for hatching, it is possible that some of the 1,050 million dozens indicated for drying for non-civilian use may be diverted to the civilian supply. If only 280 million pounds of dried eggs are produced in 1944 instead of the 350 million pounds allowed in the goal estimates, the civilian per capita consumption could be as high as 340 eggs or about the same as the 1943 consumption and 20 eggs more than the 1942 consumption.

The number of layers on farms is expected to be 11 percent larger at the beginning of 1944 than on January 1, 1943. Even with a decreased egg production per bird and heavy and continuous culling, the 1944 goal should be easily attained. The goal assumes the keeping of only the more efficient users of feed and the full feeding of these for maximum production of food from the feed used.

With the rationing of the red meats, some dairy and other products, assuming a normal seasonal distribution, it is probable that egg prices will remain at or close to the ceiling level. Despite increased production costs, the egg-feed price ratio will probably remain generally favorable for the egg producers. It is assumed also that the egg producers will be given some assurance of adequate poultry feed.

Poultry

The suggested total production of chicken meat is 4,000 million pounds, dressed weight, or about the same as both the 1943 goal and the 1943 indicated production. This total includes 3,156 million pounds from farm flocks, 316 million pounds from non-farm flocks, and 528 million pounds from broilers and other commercially produced birds. To attain this volume of dressed chickens, the slaughter of 900 million farm chickens, 90 million non-farm chickens, and 200 million broilers will be necessary.

A decrease in the production of commercially produced broilers to 200 million head in 1944 is recommended. This would be 98 percent of the 1942 production, 180 percent of the average 1937-41 production, and equal to the 1944 broiler production capacity as indicated by the State capacity reports.

The production of 4 billion pounds of chicken in 1944 will permit a per capita civilian consumption of 28 pounds compared with 29 pounds in 1943, 22 pounds in 1942, and 18 pounds for the 5-year period, 1935-39.

Turkeys

A goal of 32 million turkeys is suggested for 1944. This would be 4 percent less than the indicated 1943 production, 4 percent below the 1942 production, but 4 percent above the 1937-41 average. Because of the hatching egg shortages, the 1943 production will apparently be 14 percent below the 1943 goal of 39 million. The 1944 wartime production capacity is 35 million or 9 percent greater than the suggested goal. With 88 million pounds allotted to non-civilians, the suggested goal would allow a civilian per capita consumption of 3 pounds in 1944 against 3.5 pounds in 1943, 3.8 pounds in 1942, and 2.7 pounds during 1935-39.

Table B.- Eggs: Supplemental Information

Item	1937-41 Average	1941	1942	1943 Ind.	1944 Goal
	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.
Production:					
Farm	3,252	3,480	4,018	4,517	4,545
Non-farm	325	348	402	452	455
Total	3,577	3,828	4,420	4,969	5,000
Demand:					
Hatching	128	148	162	207	200
Civilian	3,417	3,441	3,490	3,695	3,400
Non-civilian		167	850	1,272	1,400
Total	3,545	3,756	4,502	5,174	5,000
Per capita (civilian) consumption (number)	313	316	320	347	318

Table C.- Poultry, dressed weight: Supplemental Information

Item	Unit	1937-41 Average	1941	1942	1943 Ind. 1/	1944 goal
Chickens:						
Farm slaughter	Mil. lb.	1,923	1,998	2,234	2,764 - 2,976	3,156
Nonfarm slaughter	" "	192	199	224	276 - 298	316
Total slaughter	" "	2,115	2,197	2,458		
Commercial broilers						
Slaughtered	" "	285	445	532	660 - 726	528
Total chickens and broilers slaughtered	" "	2,400	2,642	2,990	3,700 - 4,000	4,000
Utilization:						
Civilian	" "	2,387	2,566	2,858	3,361 - 3,661	3,557
Non-civilian	" "	-	52	135	327 - 327	443
Per capita civilian consumption	Pounds	18.3	19.5	21.9	26.3 - 28.7	27.7
Turkeys slaughtered:						
Total	Mil. lb.	414	468	497	500	467
Per capita (civilian)	Pounds	3.2	3.6	3.8	3.5	2.9

1/ The final figures for 1943 will probably fall within the indicated range of the figures given in this column. It is not possible to make more accurate estimates at this time because of incompleteness of the data available. The slaughter figure of 4 billion pounds for 1943 (also the goal for 1943) has been used throughout this report since the most recent data bear out previous indications that any likely deviation from this level probably will not be significant.

Requirements for Labor, Feed,
Equipment and Housing

Labor

The outlook for labor on poultry farms in 1944 is much brighter than during most of 1943. General draft deferment is now being given large numbers of agricultural workers, and it appears that early in 1944 the armed forces will have reached the size where replacements will be needed only to maintain their numbers. Large commercial producers of eggs, broilers, and turkeys in the Northeastern and the Pacific Coast States will, however, probably face labor shortages as they did in 1943.

Feed

Feed is likely to be scarce in the feed deficit areas of the Northeast and Pacific Coast. These areas are densely populated and consume many more eggs than they produce. Every effort must be made not only to provide poultrymen in these areas with adequate feed supplies, but distribution of feed must be controlled to assure maximum production.

Equipment and Housing

Poultry farmers will have more equipment in 1944 than they had during 1943. Generally, in 1943 production of poultry equipment was limited to 35 percent of the highest annual production in the years 1940-41. It is estimated that at least 80 percent of the production for that base period will be available for use by poultrymen in 1944. This should offset, to a considerable extent, skilled labor already lost that cannot be replaced. Housing is adequate to meet 1944 goals.

Processing, Storage, and Transportation Capacity

Indications are that labor, equipment, and facilities for handling, processing, and transporting poultry products in 1944 will be as nearly adequate as, and possibly more nearly adequate, than in 1943.

Eggs

The egg case problem, which gave the trade trouble early this year, seems to be satisfactorily solved by the fiber case and improved use of reconditioned wooden cases. It is expected to be tight, but better than in 1943.

Available cold storage space is threatening to become somewhat scarce this fall and may be quite scarce in the fall of 1944. Space, however, is expected to be adequate during the flush egg production season of spring and early summer.

Facilities for producing and handling the frozen eggs requirements will be adequate.

Drying capacity is sufficient to provide for 1944 anticipated needs. In fact it will be necessary to adjust price ceilings on dried eggs to a balance with shell and frozen eggs so as to enable driers to operate close to capacity throughout the year. Most of the drying plants are located in the heavy production area of the Middlewest where supplies are abundant. It is planned to accumulate a sizable backlog during the flush season to take care of drying during the fall and winter months. This practice will assist in leveling civilian supplies toward a flat pattern for the year.

Transportation has not yet offered acute difficulties to the poultry industry and is not expected to in 1944. The labor for handling and processing eggs and poultry will probably be more difficult to obtain than in 1943; this will be partially offset by greater use of labor-saving devices.

Poultry

The adequacy of poultry processing facilities is slightly more uncertain than egg processing facilities. However, a higher proportion of poultry is being sold to consumers as live birds than normally occurs. This is largely due to price relationships rather than inadequate processing facilities. We might expect much the same conditions next year unless better control is exercised over poultry distribution. Poultry, like eggs, will be subject to the insufficient storage space available for all foods. More can be told about facilities for handling the poultry goals after a survey now under way is completed.

Eggs

An unusually favorable egg-feed price relationship has prevailed for three consecutive seasons following the unfavorable relationship that existed in 1940. In years past this ratio usually has been favorable for farmers for only 2 years in succession. Accordingly, the number of chickens raised on farms usually has increased for 2 years following each 1-year decline. In the main hatching season of 1943 the spring egg-feed price ratio was the most favorable on record in the period. The preliminary estimate of the number of chickens raised on farms is 16.5 percent larger than the record number raised in 1942, and 50 percent larger than the number raised in 1940.

On the basis of past relationships, an increase of 8 to 10 percent in number of layers on farms January 1 would be expected to follow the increase in chickens raised this year. The proportion of available potential layers that farmers keep for 1944, of course, will depend a great deal on the trend of developments in the feed situation and the timing of any such developments. Average size of laying flocks reach the seasonal low in August, then increase until early January as young pullets are added. The substantially higher prices for eggs in prospect for this fall than last will encourage farmers to save the maximum number of layers that is consistent with housing facilities and available local feed supplies even though prices of feed will be somewhat higher than a year earlier. In some respects the present situation is similar to that of 1936-37. The number of chickens raised in 1936 was 9 percent larger than a year earlier. And even though the supply of feed per animal unit in 1936-37 was 22 percent smaller than a year earlier and the egg-feed ratio was very unfavorable in late 1936, the number of layers on farms was 6 percent larger at the close of 1936 than at the beginning. In 1937, however, the egg-feed ratio was very unfavorable, resulting in a reduction in both number of chickens raised and number of layers.

In all previous periods of impending feed shortages, feed prices began to rise as soon as indications began to point to a shortage. The necessary adjustment of livestock numbers to feed supplies usually was made in a fairly orderly manner. The time has about arrived when it has become necessary to choose between forcing poultrymen (and other livestock men) to run the risk of getting insufficient feed at present prices and getting adequate supplies to meet the demand at higher prices. A prolonged period of demand exceeding the supply of feed at given prices tends to result in inefficiency in the use of feed and irregular liquidation of laying flocks. Since the most efficient laying stock, from the standpoint of use of feed, is concentrated in deficit feed areas, widespread liquidation in deficit regions would be particularly undesirable. Local feed shortages and rumors of acute feed shortages have made livestock men in deficit feed areas less opposed to moderate price increases for feed than perhaps at any previous time.

One method that has been advanced for diverting feed away from hogs consists of allowing the price of corn and some other feeds to increase without changing the price ceiling on hogs. What would this mean to poultry and egg production? As a basis for answering this question it was assumed that poultry feed prices would be allowed to rise 20 percent over the mid-July price. The price for corn was estimated at \$1.40 per bushel and prices of other feeds were at comparable levels. In estimating the maximum prices obtainable of eggs by farmers under the present schedule of ceiling prices covering sales to retailers, it was assumed that the Government paying price for dried eggs next spring would be 6 cents above a year earlier and that the necessary steps would be taken to divert shell eggs to drying plants and into storage for distribution in deficit egg-producing seasons. In other words, the estimate of egg prices is based on the assumption that prices in the flush season of production (which also is the hatching season) will be maintained at maximum levels permitted by ceilings as announced in February 1943.

The prices of feed and eggs that would result from the fulfillment of the above conditions are given in Table D. The monthly egg-feed ratios that would result are listed in the last column. In the January-June period (the critical period for both egg production and hatchings) of 1944 the ratio, as given, averages 20 percent below the record of a year earlier. Based on past relationships, a reduction of such magnitude

Table D.- Farm cost of feed, price received by farmers for eggs, and egg-feed price ratio,
United States, specified periods

Period	Farm cost of ration per 100 lbs.				Farm price of eggs per dozen				Egg feed ratio			
	1932-41	1942	1943	Assumed for 1944 1/	1932-41 average	1942	1943	Estimated maximum obtainable under present ceiling (schedule) to re-tailers 2/	1932-41 average	1942	1943	Resulting ratio 1944 3/
	Dollars	Dollars	Dollars	Dollars	Cents	Cents	Cents	Cents	lb. feed	lb. feed	lb. feed	lb. feed
Jan.	1.13	1.58	1.82	2.55	20.6	31.3	30.0	40.0	20.5	19.8	21.4	15.7
Feb.	1.14	1.64	1.86	2.55	17.9	27.5	34.2	38.0	16.6	16.8	18.4	14.9
Mar.	1.14	1.66	1.92	2.55	15.5	25.8	34.0	37.0	14.4	15.5	17.7	14.5
Apr.	1.19	1.67	2.00	2.55	15.7	25.6	33.7	37.0	13.8	15.3	16.8	14.5
May	1.22	1.69	2.04	2.55	16.1	26.5	34.2	37.0	13.7	15.7	16.8	14.5
June	1.20	1.67	2.08	2.55	16.2	27.4	35.2	37.0	13.9	16.4	16.9	14.5
July	1.26	1.67	2.12	2.55	17.9	29.5	36.3	38.0	14.8	17.7	17.1	14.9
Aug.	1.26	1.67		2.55	19.3	32.2		40.0	16.2	19.3		15.7
Sept.	1.27	1.68		2.55	22.6	34.7		43.0	18.8	20.7		16.9
Oct.	1.18	1.62		2.55	25.3	37.4		45.0	23.4	23.1		17.7
Nov.	1.14	1.61		2.55	28.6	38.9		48.0	27.4	27.2		18.8
Dec.	1.17	1.69		2.55	27.1	39.7		46.0	26.2	23.5		18.0
Year	1.17	1.65		2.55		29.9			18.3	19.0		18.0

- 1/ Assuming prices of ingredients as follows: corn, \$1.40 per bu.; oats, \$.80 per bu.; barley, \$1.10 per bu.; wheat, \$1.40 per bu.; bran, \$2.30 per cwt.; tankage, \$4.50 per cwt.
2/ Assuming shell eggs are diverted to drying plants through a higher price for dried egg and that the Government buys aggressively shell eggs for storing in surplus season for distribution in deficit season.
3/ Computed from "assumed" feed prices and "estimated maximum egg prices."

would be expected to result in 5 to 8 percent reduction in number of chickens raised for flock replacement purposes. With this number of chickens raised, farmers could cull heavier than they have in recent years and maintain egg production at the 1943 level through 1945. Egg production in the first half of 1944 may be larger than in the first half of 1943 since a considerably larger number of layers probably will be on farms at the beginning of the year. But if the policy is to maintain egg production at not less than the 1943 levels through 1945, the egg-feed ratios as listed for 1944 should be interpreted as the very minimum, particularly for the spring period. Any significant reduction below the computed levels would indicate the need for supplementary inducements, perhaps something similar to the feed certificate plan being proposed for dairy products.

The above appraisal of the effects on poultry and egg production of the prices given in Table D assume, of course, that feed supplies will be available to meet the demand at the stated prices. With that condition, an egg-feed ratio equal to or above the "resulting ratio" would provide sufficient price inducement to encourage the production of eggs at an annual rate of 5 billion dozens well into 1945. It would be hazardous to attempt to estimate the effects of acute feed shortages on egg production. It is safe to assume, however, that egg production would be much greater if ample feed is available with an egg-feed ratio equal to or slightly above the "resulting ratio" than it would be if acute feed shortages become moderately widespread and even though the ratio is much higher. The latter condition leads to indiscriminate culling and extreme waste in the use of feed. Extreme efforts would be justified to avoid indiscriminate culling or liquidation of laying stocks. Orderly culling can be brought about either by reducing the egg-feed ratio from levels that have prevailed or by systematically limiting supplies of feed to each poultryman. The latter approach would be a heavy burden administratively, of course, since probably more than 6 million farmers will sell eggs in 1944.

Chickens

A reduction of 5 to 8 percent in the number of chickens raised in 1944, compared with 1943, means that between 850 and 875 million head would be raised compared with 926 million head, the preliminary estimate for 1943. Based on the culling rates of recent years, such a number raised would provide a number of layers somewhat above the January 1, 1943 figure. From the standpoint of good management practices, it would be desirable to raise as many as 900 million head in 1944. Thereby more nearly optimum culling rates would be allowed for in obtaining the desired number of layers for egg production in 1945. This would require a substantial change in management practices, which would be difficult to accomplish since the inducement necessary to encourage farmers to raise 900 million birds also would encourage them to save a large proportion of available potential layers. However, since this is an admirable objective on the whole from the standpoint of efficient use of feed, it is recommended that 900 million chickens raised be established as a goal even though given price relationships would not be expected to accomplish both objectives simultaneously. Any reduction in supplies of chicken meat that would result should fewer than 900 million birds be raised on farms next year probably would be compensated for by an increase in broiler production over the goal of 200 million head. Enforcing ceiling prices on broilers may be even more difficult in 1944 than in 1943. Production of broilers at ceiling prices would be reasonably profitable even if feed prices increased 20 percent over mid-July 1943 levels but such a change in price relationships would tend to cut back broiler production.

The slaughter of chicken meat in 1944 would be only slightly below this year's level even if numbers raised were reduced 7 percent, 200 million broilers were raised, and no out-of-season birds were raised on general farms. This is possible because inventory numbers will be reduced in 1944 instead of increased as they have been for 3 consecutive years. On the basis of the above conditions, the dressed weight of chickens slaughtered in 1944 would be about 4 billion pounds, about the same as the probable 1943 level.

Turkeys

A 20 percent increase in feed prices normally would result in a 5 to 10 percent reduction in numbers of turkeys raised, assuming turkey prices are unchanged. But since the demand for turkey poults this year greatly exceeded the supply, it is likely that farmers would raise as many turkeys as in 1943 even if feed prices were allowed to advance in proportion to an increase to \$1.40 per bushel for corn.

Table V - Price Data for 1944 Production Goals

Returns from Eggs

A. Historical and Present Prices Per Unit (doz.)

(1) January 1935 - December 1939 average	\$	0.217
(2) 1941 average	\$	.250
(3) 1942 average	\$	.314
(4) July 1943 average	\$	.363

B. Price Ceiling Provisions

(1) *Parity or comparable price July 1943	\$	0.323
(2) *Highest price Jan. 1 - Sept. 15, 1943	\$	.330
(3) Price ceiling July 1943	<u>1/</u> \$	.36-.38

C. Price Support Provisions

(1) Present support price	<u>2/</u> \$	0.30-.34
(2) Present additional inducements		
(3) Total gross returns		
(4) 90 percent of parity	\$	.291

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1) July 1943 Index Price of Commodity		
Base 1909-14		169
(2) July 1943 Index Price of Commodity		
Base 1935-39		167
(3) July 1943 Index Commodities Used in Production		
Base 1909-14		164
(4) July 1943 Index Commodities Used in Production		
Base 1935-39		129
(5) *July 1943 Index of Farm Wages		
Base 1935-39		225
(6) Unit returns to equal return from competing crops		

E. Suggested 1944 Price

(1) Suggested average price to farmers	<u>3/</u> \$	0.38-.40
(2) Suggested inducements (average value per unit)		
(3) Total suggested return per unit		

* Seasonally adjusted.

1/ Farm price derived from ceiling prices.

2/ The price support for eggs has been announced at not less than 30 cents in the spring and early summer and not less than 34 cents annual average United States farm price basis.

3/ Assuming feed prices are increased moderately over the July 1943 level.

Table V - Price Data for 1944 Production Goals

Returns from Chickens

A. Historical and Present Prices Per Unit (lb.)

(1) January 1935 - December 1939 average	\$	0.149
(2) 1941 average	\$	.156
(3) 1942 average	\$	.188
(4) July 1943 average	\$	.253

B. Price Ceiling Provisions

(1) Parity or comparable price July 1943	\$	0.188
(2) *Highest price Jan. 1 - Sept. 15, 1943	\$	.196
(3) Price ceiling July 1943	<u>1/</u> \$	.24-.25

C. Price Support Provisions

(1) Present support price	\$	<u>2/</u>
(2) Present additional inducements		
(3) Total gross returns		
(4) 90 percent of parity	\$	0.169

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1) July 1943 Index Price of Commodity		
Base 1909-14		222
(2) July 1943 Index Price of Commodity		
Base 1935-39		170
(3) July 1943 Index Commodities Used in Production		
Base 1909-14		164
(4) July 1943 Index Commodities Used in Production		
Base 1935-39		129
(5) *July 1943 Index of Farm Wages		
Base 1935-39		225
(6) Unit returns to equal return from competing crops		

E. Suggested 1944 Price

(1) Suggested average price to farmers	\$	0.25
(2) Suggested inducements (average value per unit)		
(3) Total suggested return per unit		

* Seasonally adjusted.

1/ Estimated farm prices derived from ceiling prices.

2/ The Department has announced that prices would be supported at not less than 90% of parity; since prices have been above this level, no action has been necessary.

Table V - Price Data for 1944 Production Goals

Returns from Turkeys

A. Historical and Present Prices Per Unit (lb.)

(1) January 1935 - December 1939 average	\$ 0.160
(2) 1941 average	\$.168
(3) 1942 average	\$.216
(4) July 1943 average	\$.285

B. Price Ceiling Provisions

(1) Parity or comparable price July 1943	\$ 0.238
(2) *Highest price Jan. 1 - Sept. 15, 1943	\$.238
(3) Price ceiling July 1943	<u>1/</u> \$.28-.30

C. Price Support Provisions

(1) Present support price	\$ ---
(2) Present additional inducements	\$ ---
(3) Total gross returns	\$ ---
(4) 90 percent of parity	\$ 0.214

D. Factors Affecting the 1944 Price Needed to Obtain Goal

(1) July 1943 Index Price of Commodity	
Base 1909-14	198
(2) July 1943 Index Price of Commodity	
Base 1935-39	178
(3) July 1943 Index Commodities Used in Production	
Base 1909-14	164
(4) July 1943 Index Commodities Used in Production	
Base 1935-39	129
(5) *July 1943 Index of Farm Wages	
Base 1935-39	225
(6) Unit returns to equal return from competing crops	

E. Suggested 1944 Price

(1) Suggested average price to farmers	\$ 0.28-.30
(2) Suggested inducements (average value per unit)	
(3) Total suggested return per unit	

* Seasonally adjusted.

1/ Estimated farm price derived from ceilings for the main marketing season.

Problems in Obtaining Suggested Goal

The feed situation overshadows all other problems which may stand in the way of reaching poultry and egg goals in 1944. In fact all factors except feed will be more favorable next year than they were this year. The problem for 1944 is mainly one of adjusting poultry numbers to desired levels without causing indiscriminate culling of poultry flocks and incidental wasting of feed. If necessary, extreme efforts should be taken to avoid disorderly liquidation of poultry flocks, particularly laying flocks.

The price ceilings now in effect will not unduly interfere with the attainment of the suggested egg and poultry goals. In fact, with respect to price ceilings, the problem will be mainly one of enforcing existing ceilings on broilers in order to get the desired reduction in output. The demand for chicken probably will be even stronger in 1944 than it has been this year and if feed prices should be higher, enforcing ceilings on broilers probably will become increasingly difficult. The industry is organized, from hatchery flocks through dressing plants and marketing organizations, to easily produce considerably more than 200 million head of broilers in 1944. A reduction in the number of chicks hatched for broilers and farm flocks will tend to relieve the pressure on prices of chicks and hatching eggs. Hence there will be less need for ceilings on baby chicks and hatching eggs in 1944 than in 1943.

Although price ceilings may not interfere with the farm production program, some readjustment of ceilings would be desirable to expedite the procurement and distribution programs. The price for dried eggs, particularly will have to be increased over this year's level if 350 million pounds of dried eggs are to be produced next year and aggressive steps are taken to improve the seasonal distribution of civilian supplies of eggs. During the first half of 1943 egg prices in many sections of the Nation were below ceiling levels and consumption was very heavy. In the second half of 1943, however, demand exceeded supplies at ceiling prices even though such prices were seasonally higher than earlier in the year. Repetition of this situation in 1944 could be avoided in part at least through an aggressive storage program carried on either by the Government or by private operators. In 1943 Governmental food orders were issued which were designed to prohibit private storage operators from storing shell eggs for civilian uses thereby making larger quantities available for egg dryers. Meanwhile the civilian demand for eggs continued to increase and consumption was at a very high level.

Ducks

The Department of Agriculture has not estimated duck production and goals have never been established for this item. However, in view of the importance of duck feathers and down in equipping the armed forces (especially in providing sleeping bags) it is recommended that efforts be made to provide enough feed to some concentrated areas, such as Long Island, to maintain duck production at this year's level.

Recommendations for Goal Attainment

Poultry raisers are asked to produce about the same number of eggs and slightly less chicken and turkey meat during 1944 that they produced in 1943.

Eggs

There are two poultry management practices that are highly important in securing efficient and voluminous egg production. They are continuous culling and full feeding. By retaining only the high egg producers and giving them all they will eat, the available feed will be stretched to produce the needed volume of eggs. Increasing the average cumulative monthly production per layer by a single egg for 1944 will save 125,000 tons of feed in the production of the 5 billion dozen eggs requested. By culling out the low producer as soon as she goes out of production and is still in good flesh, the meat supply of the Nation will be supplemented.

The culling program is recommended for the runty, slow-growing pullets in the growing flock and the off-condition, low-production layer. The older hens, unless saved for breeding stock, should be given a very thorough culling.

Production Goals
1944

8-17-43
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SAFFLOWER SEED

Safflower is grown for commercial purposes chiefly in Pondera, Teton, and Toole counties in Montana, though other northern Great Plains sections are adapted for its growth.

Montana reported 1,100 acres in 1941 and 4,000 acres in 1942, which produced about 60,000 bushels. In 1943 the acreage was limited, but probably will produce ample seed for considerable acreage expansion in 1944, if desired as an alternate for flax.

The oil possesses drying properties; the oilcake has value as a stock feed. The chief source of drying oils used in varnishes, oilcloth, linoleum, etc., is linseed oil. Safflower oil could be used as a substitute or additional source of drying oils. It grows in much the same localities and under conditions favorable for flax. It may be grown in the same manner and handled with the same machinery as now employed for small grain crops. Yields may reach 25-30 bushels per acre (45 pounds per bushel with 24-27 percent of oil) under optimum conditions, double that under irrigation. Over a long period of time at the experiment station at Havre, Montana (dryland) the yield was about the same as flax.

Oil can be extracted in much the same manner as linseed oil, but requires some changes in the process involving the use of heat. To date, crusher operators have reacted unfavorably to making these changes. To obtain maximum yields of oil and the best quality of press cake, it is essential that the seed be decorticated before crushing, as is done with cottonseed.

The Committee recommends that safflower be indicated as an alternative to flax, where the yield of oil per acre is as great or greater, and that the price be based on the yield of oil as compared with flax.

SUNFLOWER SEED

Sunflower is most commonly used for silage and for poultry scratch feed, but is also used as an oil bearing seed. Yields are extremely erratic from year to year and vary widely between areas. In 1929 the Bureau of Agricultural Economics estimated average yields of 700 pounds per acre in California, 400 pounds for Missouri, and 650 pounds for Illinois.

The seed yields from 22 to 32 percent oil, most of which is edible. It has no unique or irreplaceable uses.

No figures are available on acreage.

The crop may be planted earlier than corn and sometimes is used on land which is too wet for corn or soybeans.

Mustard seed contains about 30 percent oil comparable in quality and uses with rapeseed oil used in marine engines. Because of the demand for oil, about 16,400,000 pounds of seed were crushed for oil between October, 1942, and July 1, 1943, by seven oil crushers, who had shown but little interest in mustard seed oil previously. Crushers were paying \$60 per ton F. O. B. Montana, but have not been able to buy recently at that price, as it is now held at \$80 to \$100 per ton. Comparable oils are limited as to price as follows: Soybean oil, 11-3/4 cents per pound (ceiling); rapeseed oil, 13 cents (ceiling at New York); linseed, 14-1/2 cents (delivered Zone No. 1, as far east as Chicago); mustard seed oil has sold recently at 14 - 14-1/2 cents in tank cars delivered to California from seed originating in Montana.

Mustard seed competes with flax and wheat (and to a limited degree with safflower) for acreage in Montana. The same machinery is used in planting, harvesting, and threshing. The acreage can be increased as required by offering proper price incentives. In other States, California, Washington, Oregon, the adapted acreage is limited and it is probable only small increases in acreage could be effected.

The Committee recommends that the requirement for mustard oil (5 million pounds--equivalent to 37,000 acres of mustard) be included in the over-all vegetable oil requirement and that mustard for oil be considered as an alternative to flax where the yield of oil per acre is as great or greater.

WAXY CORN AND SORGHUM

Estimates of the essential 1944 needs for waxy starch range from 20 million to 150 million pounds. Representatives of the corn processing industry agreed on 50 million pounds as being adequate to meet all indispensable needs.

Within the past few weeks WPB has approved the construction of a plant in Florida for the manufacture of starch from sweetpotatoes. This starch is completely substitutable for the starch derived from waxy corn or sorghum. The plant will be available for operation by late summer, 1944, and has an annual capacity for 76,000,000 pounds. The company owns its own land and proposes to grow its own potatoes.

A further factor is the easing up of the shipping situation in the Caribbean area where normal imports to this country approximate 30 million pounds, with an additional supply available in Brazil if shipping permits.

The demand for waxy corn and sorghum as such thus is conditioned largely on availability of processing facilities.

As a feed crop waxy corn yields slightly less than regular corn. Sorghum yields are approximately equal.

In view of these facts the Committee recommends that State and county War Boards assist processors in the contracting of acreage at a price not less than the return per acre for corn or sorghum, and that the acreage requirement be included in the over-all goal for these crops.

HEMP

1944 calendar year requirements for cordage fiber indicate a deficit in supply of 75,000,000 pounds, assuming a production of 64,000,000 pounds of line fiber in this country. No figures are available on 1945 requirements and supply. The Committee assumes a continuation of the 1944 requirements and supply picture into 1945.

On the basis of this assumption, American 1944 hemp acreage should exceed 320,000 acres, except for one factor--the possibility of securing Italian hemp.

Italy normally produces slightly in excess of 110,000 tons of line fiber per year. Of this amount approximately one-third is produced on the Southern half of the peninsula, the remainder in the Po Valley.

Assuming the same requirements and the same supply from other sources, if the Allies occupy the Southern half of Italy by February, 1944, we should be able to meet most of the deficit from that source. This would call for maintaining next year's hemp production in this country at slightly in excess of this year's level.

Our present program calls for 42 mills which are now under construction and will be completed by November 1. Capacity operation of these plants will require about 5,000 planted acres per plant. Present indications are that seed supplies will be adequate. Since 1944 seed production will be used to meet 1945 hemp production requirements, it is impossible to determine a precise 1944 hemp seed goal. Assuming a continuation of the program at present levels, approximately 40,000 acres will be required.

Present prices appear to be adequate incentive for the procurement of acreage, pending the results of this year's harvest. If returns are unusually low because of unfavorable yields, it may be necessary to offer additional incentives.

Present indications are that additional field machinery will have to be provided--drills, hemp harvesters, hemp gather-binders, and possibly hemp turners.

The Committee makes the following recommendations:

1. The establishment of a hemp fiber goal of 225,000 acres, with the following State breakdown:

Illinois	-	55,000	Kentucky	-	7,000
Indiana	-	10,000	Minnesota	-	56,000
Iowa	-	55,000	Wisconsin	-	42,000

2. The establishment of a hemp seed goal for Kentucky of 38,000 acres, and 2,000 acres for Tennessee.
3. The maintenance of present prices pending review after harvest of this year's crop.
4. The review of the established goals in the light of military developments about January 1.

TOBACCO

The outlook for tobacco supply is one of scarcity which will become increasingly severe through the end of the 1944 marketing year. Inventories of all major types are the lowest relative to usage since systematic records have been kept, and are very much smaller than have been regarded in the past as sound and necessary for aging and blending purposes. The 1943 crops are all substantially below disappearance during the last year. Domestic manufacture is expected to increase, stimulated by large demands from the Armed Services and by increases in civilian buying. Furthermore, present policy dictates that our Armed Services be extremely liberal in distributing tobacco products to the peoples of reoccupied areas. Exports, which are almost completely to our Allies and in large part for their military forces, are sure to increase, and favorable military developments will greatly increase the demand from present sources as well as from reoccupied territories. These international requirements must be met largely from United States supplies, in view of the even greater shortage of stocks abroad and in view of the failure of other producing areas to increase production in spite of strenuous efforts. As well, from both our long-run trade position and our short-run bargaining position, it is desirable that every reasonable effort be made to meet these requirements in large part, although it must be assumed that we cannot succeed in meeting them fully.

The cumulative total effect of these domestic and international developments extending through the 1944 marketing year shows clearly that even under the most favorable 1944 production conditions we will continue to be faced with problems of depleted domestic and foreign inventories, marked deterioration of quality of tobacco products, and a weaker position in international trade and trade policy. It is against this background of a rapidly deteriorating present position and necessarily still weaker future position that requirements for 1944 production must be considered. The statements made above refer generally to most tobacco types but are particularly true of flue-cured, Burley, and Maryland, the types used in cigarettes and representing normally about 3/4 of the domestic crop.

Probable price ceilings for types used in cigarette manufacture are not expected to interfere with the attainment of goals. In the case of possible cigar leaf and dark tobacco price ceilings, the establishment of ceilings as low as parity or the 1942 market averages might, however, discourage planting unduly. No significant processing, storage, or transportation problems are envisaged.

The 1944 wartime capacity for tobacco, as reported by the States, is approximately the acreage grown in 1943. Slight reductions suggested by some states for flue-cured or Burley were largely offset by slight increases suggested by other states growing the same tobacco type. The changes suggested were generally within a range of 1% from the 1943 acreage.

The Committee recommends the following range in 1944 goals to be considered:

	: : Acreage : same as 1943 :	: : Acreage : larger than 1943 :	: : <i>Increase</i> : % Acreage : over 1943 acreage :
Flue-cured	: 838,800	: 1,006,560	: 120
Burley	: 405,000	: 465,750	: 115
Maryland	: 35,500	: 42,600	: 120
Fire-cured	: 75,300	: 82,830	: 110
Dark air-cured	: 34,700	: 38,170	: 110
Cigar Filler	: 39,300	: 43,230	: 110
Cigar Binder	: 33,000	: 36,300	: 110
Cigar Wrapper	: 9,400	: 9,870	: 105
	: :	: :	: :

Specific comments on the position of each of the types are given below, based upon the range of recommendations considered by the Tobacco Committee.

FLUE-CURED (Range, 120% to 100% of 1943 acreage)

The proposal for a 20% increase is identical with the last assumption for flue-cured treated statistically in Table 1. Both of the goals named assume the same export and domestic requirements, namely, 375,000,000 pounds and 660,000,000 pounds, respectively. Differences of opinion are concentrated upon the question of the months' duration to be planned for domestic operating stocks.

It would provide for a slightly ^{more} ~~less~~ than 16-month carryover in domestic operating stocks, most of which would be in manufacturers' hands. It is based upon a minimum of export requirements and export stocks but it is somewhat short of an assumed minimum for domestic operating stocks. It would require a curtailment of the domestic inventory position from roughly 21 months' supply on July 1, 1943, and about 18 months' on July 1, 1944, to a planned 16 months' on July 1, 1945, as contrasted with a normal holding of 24 to 30 months' inventory. It would imply some margin of safety by which increases in export requirements could be met from so-called domestic operating stocks. It would provide some hedge against lower than average yields next year. This is desirable because 1939-43 average yields assumed for statistical purposes in Table 1 have been equalled or exceeded in only two years in flue-cured history. For example, if 1937-41 yields were assumed, 1944 production would be about 6% smaller than calculated in Table 1. It would also provide a hedge against the grave risks involved in underestimating the requirements, or against operating problems. The scarcity of major types has already damaged the existing marketing system and seriously undermined years of educational work by the Department as to proper grower marketing practices. It has led to sometimes insoluble government procurement problems, and to both price ceilings and allocation orders which have proved difficult to administer and highly unsatisfactory. The degree to which scarcity further develops will influence the efficiency and fairness with which government operating problems can be met.

The proposal to hold flue-cured acreage at 100% of 1943 is statistically acceptable on the assumption that if deterioration in product quality from 24 or more months' aging to 16 months' is permissible for military and civilian consumers, a further reduction to 13.2 months is acceptable in view of larger requirements for sweet potatoes, soybeans, peanuts, and feedstuffs. Such a reduction in stocks would require drastic changes in our cigarette blends. It also provides no margin of safety against very possible declines in the high yields assumed or against extremely likely increases in export requirements. It assumes that adjustments in production should stress feedstuffs while maintaining tobacco acreage.

It is believed that production capacity exists for achieving either goal, although it is believed that the larger goal may force some curtailment of food production. It is agreed that the bottleneck factor is labor, but there is some question as to the effect of labor requirements. On the one hand, it may be assumed that no increase in flue-cured acreage can occur without a direct and parallel decrease in other crops, when land only is considered. If the labor requirement is considered, an increase in tobacco would cause a more than proportionate acreage decrease in food or feed crops. On the other hand, although a 20% increase in flue-cured acreage will not permit of as large goals for other crops, some of the increase in tobacco might be absorbed by the labor which will be available. Fertilizer requirements for flue-cured tobacco are heavy. Returns to farmers are considered adequate to bring out the larger production. In fact, there is reason to believe that the high prices obtained this year may cause the lower of the two goals suggested to be unattainable, since some overplanting of individual allotments may be expected in spite of marketing quotas.

BURLEY

(Range, 115% to 100% of 1943 acreage)

16.7 These goals would provide, respectively, for approximately 18 months' and 15.1 months' domestic operating stocks. Both goals assume a domestic requirement for 450,000,000 pounds, and an export requirement for 6,000,000 pounds. The maximum goals for types used in cigarettes would plan for about 16 months' carryovers for all such types. The same general reasoning as to flue-cured is also applicable to increased Burley goals, except that export requirements and problems are negligible for Burley. It is believed that pressure on other crops would not be so great from Burley as from flue-cured, and this position would be reflected in assuming a minimum goal considerably above statistically minimum domestic requirements. (For example, 13 months' carryover, suggested for flue-cured, if assumed for Burley would result in a 20% cut in Burley acreage.) For this reason and because of some degree of substitutability between Burley and flue-cured domestically, which would permit indirectly an easing of the flue-cured export situation if necessary, it seems desirable to plan for a domestic carryover for Burley in line with that for flue-cured.

Again, no substantial problems of production capacity or resources are envisaged for Burley. As remarked above, labor requirements for other crops will not be impinged upon to as great an extent as with flue-cured. Fertilizer requirements for Burley are not as great as for flue-cured, inasmuch as a smaller percentage

of Burley is fertilized, and inasmuch as applications are lighter. Commodity returns are sufficiently high to encourage the production of the maximum goals, perhaps so high as to prevent attainment of the minimum goals.

MARYLAND

(Range, 120% to 100% of 1943 acreage)

The maximum goal would provide for about a 15-month carryover on July 1, 1945; the minimum goals would result in planning for a 12.4-month carryover on that date. Both goals are based upon requirements of 33,000,000 pounds domestically and 3,000,000 pounds for export. Maryland acreage will be controlled largely by the already marked shortage of the labor factor in that area. The larger goal would, however, give recognition to the need for a larger crop of this type. The smaller goal is probably closer to the acreage we can expect next year.

FIRE-CURED AND DARK AIR-CURED

(Range, 110% to 100% of 1943 acreage)

The fire-cured goals both assume 50,000,000 pounds for domestic requirements and 45,000,000 pounds for export requirements. The dark air-cured goals are both based upon domestic requirements for 29,000,000 pounds and export requirements for 10,000,000 pounds.

The future position of these types would be seriously affected by continuance of present low plantings. Grower pessimism as to needs and prospects over the next few years has reached unwarranted extremes. It is desirable to have a small percentage increase in plantings, and especially desirable that the Department make clear to growers its confidence in the future of these types at slightly above present production levels. No reasonable price increases would ~~ASSURE~~ ~~assume~~ increased plantings, and hence no support prices in addition to the mandatory loan are recommended.

CIGAR FILLER

(Range, 110% to 100% of 1943 acreage)

Domestic requirements for 65,000,000 pounds are assumed for both goals. Both goals would result in a slight decline in domestic inventories as compared with requirements as foreseen. Some skepticism has been expressed as to whether it is possible to attain a 10% increase in cigar filler acreage. In view of a possible undue relaxation of the quota on Cuban filler, it would be desirable to permit some increase in domestic planting as a protection to Continental growers.

CIGAR BINDER

(Range, 110% to 100% of 1943 acreage)

Both goals are based upon a domestic requirement for 65,000,000 pounds. As in the case of cigar filler, both goals would force some decline from normal or from present inventory holdings. More strictly cigar types of binder are grown in an area of labor shortage. The increase in consumption of scrap chewing and a shortage of quality binders for cigars suggests that the production of binder types should be definitely encouraged.

CIGAR WRAPPER
(Range, 105% to 100% of 1943 acreage)

A domestic requirement for 9,500,000 pounds is assumed in both cases. Although it is difficult for the Department to plan the future of the wrapper types, an impending shortage of Sumatra wrapper dictates an increase in the planting of domestic wrapper.

Estimated Requirements for 1944-1945
(Farm Sales Weight)

Table 1 Revised

TOBACCO

Development of Tobacco Requirements in Millions of Pounds

Kind	Assumed U. S. Carry-over at End of 1944-45 With 1944-45 U.S. Requirements	Stocks, 1944-45												Net Total Requirements to be met out of Production 1939-43 Av. Yields
		Beginning of Year						End of Year						
		Domestic Requirements	Export Requirements	Operating Requirements	Domestic Requirements	Export Requirements	Operating Requirements	Domestic Requirements	Export Requirements	Operating Requirements	Domestic Requirements	Export Requirements	Operating Requirements	
1	2	3	4	5	6	7	8	9	10	11	12	13		
Flue-cured	12 Months	660.0	375.0	1,000.0	205.0	1,205.0	660.0	250.0	910.0	-295.0	740.0	92		
	14 "	"	"	"	"	"	770.0	"	1,020.0	-185.0	650.0	106		
	16 "	"	"	"	"	"	880.0	"	1,130.0	-75.0	960.0	119		
	18 "	"	"	"	"	"	990.0	"	1,240.0	435.0	1,070.0	133		
	15.2 "	"	"	"	"	"	724.0	"	974.0	-231.0	604.0	100		
	16.1 "	"	"	"	"	"	885.0	"	1,135.0	-70.0	965.0	120		
	14.6 "	"	"	"	"	"	804.0	"	1,054.0	-151.0	884.0	110		
Burley	12 Months	450.0	6.0	629.0	6.0	635.0	450.0	10.0	460.0	-175.0	281.0	71		
	14 "	"	"	"	"	"	525.0	"	535.0	-100.0	356.0	90		
	16 "	"	"	"	"	"	600.0	"	610.0	-25.0	451.0	102		
	18 "	"	"	"	"	"	675.0	"	685.0	450.0	506.0	127		
	15.1 "	"	"	"	"	"	566.0	"	576.0	-59.0	397.0	100		
	16.7 "	"	"	"	"	"	626.0	"	636.0	41.0	457.0	115		
	16.2 "	"	"	"	"	"	606.0	"	616.0	-170.0	437.0	110		
Maryland	12 Months	35.0	3.0	43.0	2.0	45.0	33.0	3.0	36.0	-9.0	27.0	96		
	14 "	"	"	"	"	"	38.5	"	41.5	-3.5	32.5	116		
	16 "	"	"	"	"	"	44.0	"	47.0	42.0	38.0	136		
	18 "	"	"	"	"	"	49.5	"	52.5	47.5	43.5	155		
	12.4 "	"	"	"	"	"	34.0	"	37.0	-8.0	28.0	100		
	14.4 "	"	"	"	"	"	39.5	"	42.5	-2.5	33.5	120		
	13.5 "	"	"	"	"	"	37.0	"	40.0	-5.0	31.0	110		
Fire-cured	12 Months	50.0	45.0	107.0	45.0	152.0	50.0	55.0	105.0	-47.0	48.0	70		
	14 "	"	"	"	"	"	58.5	"	113.5	-38.5	56.5	82		
	16 "	"	"	"	"	"	67.0	"	122.0	-30.0	65.0	94		
	18 "	"	"	"	"	"	75.0	"	130.0	-22.0	73.0	106		
	20 "	"	"	"	"	"	83.5	"	138.5	-13.5	81.5	118		
	17 "	"	"	"	"	"	71.0	"	126.0	-26.0	69.0	100		
	18.7 "	"	"	"	"	"	78.0	"	133.0	-19.0	76.0	110		

Development of Tobacco Requirements in Millions of Pounds														
Kind	Assumed U. S. Carry-over at End of 1944-45	Domestic Requirements	Exports	Beginning of Year	End of Year	Net Change	Net Requirements	Percent of Production						
									1944-45	1945-46	1946-47	1947-48	1948-49	1949-50
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Dk. Air-cured	12 Months	29.0	10.0	52.0	6.0	58.0	29.0	12.0	41.0	-17.0	22.0	67		
	14 "	"	"	"	"	"	34.0	"	46.0	-12.0	27.0	82		
	16 "	"	"	"	"	"	39.0	"	51.0	-7.0	32.0	97		
	18 "	"	"	"	"	"	43.5	"	55.5	-2.5	36.5	111		
	20 "	"	"	"	"	"	48.0	"	60.0	12.0	41.0	124		
Cigar Filler	16.5 "	"	"	"	"	"	40.0	"	52.0	-6.0	33.0	100		
	18 "	"	"	"	"	"	43.5	"	55.5	-2.5	36.5	110		
	18 Months	65.0	0	141.0	0	141.0	65.0	0	97.5	-43.5	21.5	41		
	21 "	"	"	"	"	"	114.0	"	114.0	-27.0	38.0	72		
	24 "	"	"	"	"	"	130.0	"	130.0	-11.0	54.0	102		
Cigar Binder	27 "	"	"	"	"	"	146.0	"	146.0	45.0	70.0	132		
	23.8 "	"	"	"	"	"	129.0	"	129.0	-12.0	53.0	100		
	24.8 "	"	"	"	"	"	134.5	"	134.5	-6.5	58.5	110		
	16 Months	65.0	0	116.0	0	116.0	65.0	0	87.0	-29.0	36.0	72		
	18 "	"	"	"	"	"	97.5	"	97.5	-18.5	46.5	93		
Cigar Wrapper	20 "	"	"	"	"	"	108.5	"	108.5	-7.5	57.5	115		
	22 "	"	"	"	"	"	119.0	"	119.0	43.0	68.0	136		
	16.6 "	"	"	"	"	"	101.0	"	101.0	-15.0	50.0	100		
	19.6 "	"	"	"	"	"	106.0	"	106.0	-10.0	55.0	110		
	12 Months	9.5	0	12.7	0	12.7	9.5	0	9.5	-3.2	6.3	69		
16.7 "	14 "	"	"	"	"	"	11.1	"	11.1	-1.6	7.9	87		
	16 "	"	"	"	"	"	12.7	"	12.7	0.0	9.5	104		
	18 "	"	"	"	"	"	14.3	"	14.3	11.6	11.1	122		
	15.5 "	"	"	"	"	"	12.3	"	12.3	-0.4	9.1	100		
	16.2 "	"	"	"	"	"	12.8	"	12.8	40.1	9.6	105		
										13.2	10.0	110		

Excludes of Japanese occupied areas

FLUE-CURED TOBACCO

Requirements 884 Million lbs.

Goal Production 922,700 acres

Table 2 Revised

State	PRODUCTION (Mil. lbs.)					Average Yield (lbs)				1944 GOAL		
	1937-41		1942		Goal	1937-41		1942		Assmd.	Prod.	Acres
	1	2	3	4	5	6	7	8	9	10	11	12
Maine												
N. H.												
Vt.												
Mass.												
R. I.												
Conn.												
N. Y.												
N. J.												
Pa.												
W. B.												
Ohio												
Ind.												
Ill.												
Mich.												
Wis.												
Minn.												
Iowa												
Mo.												
S. Dak.												
Nebr.												
N. Cent.												
Del.												
Md.												
Va.		76.9	77.9	70.0	78.3	802	950	885	84.7	95.7		
N. Va.												
N. C.		577.5	566.8	554.4	555.6	931	1,052	983	622.8	633.6		
Ky.												
Tenn.												
S. Cent.		654.4	644.7	604.4	633.9	910	1,037	970	707.5	729.5		
S. C.		99.5	96.8	91.0	85.5	949	1,075	971	96.1	99.0		
Ga.		78.4	58.9	68.9	64.8	944	860	886	70.2	79.2		
Fla.		14.1	11.2	11.5	10.7	833	860	800	12.0	15.0		
Ala.		.2	.1	.2	.2	766	700	740	.2	.2		
Miss.												
Ark.												
La.												
Okl.												
Tex.												
South		152.2	167.0	171.6	161.2	931	977	923	178.6	193.4		
N. Dak.												
Nebr.												
Mont.												
Idaho												
Wyo.												
Colo.												
N. Mex.												
Ariz.												
Utah												
Nov.												
Wash.												
Oreg.												
Calif.												
West.												
U. S.		846.6	1811.7	773.0	795.1	919	1,024	960	886.0	922.7		

Requirements 437 Million lbs.

Local Production 446,800 acres

4 2 Revised Continued

State	PRODUCTION (Mill. lbs.)				Average Yield (lbs.)		1964 Goal		Acres
	1937-41	1942	1943	1944	1937-41	1942	1943	1944	
	1	2	3	4	5	6	7	8	9
Ala.	12.6	12.1	13.0	13.5	921	1030	984	14.6	15.4
Ark.	9.7	8.4	9.1	9.6	929	985	981	10.9	11.1
Cal.									
Col.									
Conn.									
Del.									
Fla.	5.9	5.1	5.8	5.6	990	1000	985	6.1	6.2
Ga.									
Idaho	28.1	25.6	28.0	28.5	930	998	972	31.8	32.7
Ill.									
Ind.	11.9	10.6	11.4	11.8	1103	1200	1145	15.3	11.6
Iowa	2.7	2.2	2.3	2.6	924	936	803	2.8	3.1
Kent.	7.7	7.6	7.8	8.1	1014	1150	1099	9.1	9.6
La.	267.9	241.0	272.8	267.3	929	960	970	308.4	317.9
Maine	60.9	58.0	62.9	62.4	960	1000	986	70.5	71.6
Md.	321.1	317.4	357.2	362.2	936	977	979	404.1	412.9
Mass.									
Mich.									
Mont.	.1	.1	.1	.1	820	750	810	.1	.1
Neb.									
N.C.									
N.D.									
Ohio									
Ore.									
Penn.									
R.I.									
S.C.									
S.D.									
Tenn.									
Texas									
Va.									
Wash.									
West.									
Wis.									
Wyo.									
Total	369.7	343.3	385.5	381.0	940	979	979	456.2	445.6

Requirements 267 Million lbs.
Goal Production 249,500 acres

Table 2 Revised Continued

State	PRODUCTION (Mill. lbs.)				AVERAGE YIELD (lbs.)			1944 GOAL		
	1937-41		1942	1943	1937-41		1942	Assmd.	Prod.	Acres
	1	2	3	4	5	6	7	8	9	10
Maine										
N. H.										
Vt.										
Mass.		9.0	9.0	8.6	8.6	1,498	1,628	1,649	9.6	5.8
R. I.										
Conn.		21.6	18.6	20.3	19.1	1,282	1,256	1,346	21.5	15.8
N. Y.		1.4	1.4	1.4	.7	1,360	1,480	1,510	1.0	.8
N. J.										
Pa.		45.4	46.0	50.0	43.7	1,469	1,343	1,460	48.7	34.3
N. C.		77.4	75.0	80.3	72.1	1,412	1,349	1,439	81.8	66.7
Ohio		15.1	12.0	10.0	7.5	1,020	1,220	1,074	9.9	9.2
Ind.		.4	.2	.2	.2	870	950	900	.2	.2
Ill.										
Mich.										
Wis.		32.1	29.2	27.2	27.7	1,416	1,621	1,466	28.7	19.6
Minn.		.7	.7	.7	.7	1,170	1,200	1,180	.7	.6
Iowa										
Mo.										
S. Dak.										
Nebr.										
N. Cent.		48.3	42.1	38.1	36.1	1,254	1,412	1,334	39.5	29.6
Del.										
Md.		29.7	31.0	30.6	24.8	776	786	798	31.0	39.0
Va.		19.9	15.7	14.6	14.1	829	963	894	16.4	18.4
W. Va.										
N. C.										
Ky.		68.9	57.5	53.4	53.1	863	997	927	60.5	65.3
Tenn.		46.3	31.8	30.2	31.8	877	991	947	36.1	37.1
E. Cent.		164.8	136.0	128.7	123.6	846	954	886	143.0	159.8
S. C.										
Ga.		.9	.8	.7	.7	960	389	943	.8	.8
Fla.		3.3	3.6	2.9	2.8	989	1,068	983	2.9	3.0
Ala.										
Miss.										
Ark.										
La.										
Okla.										
Tex.										
South.		4.2	4.2	3.6	3.5	987	1,023	976	3.7	3.8
N. Dak.										
Kans.										
Mont.										
Idaho										
Wyo.										
Colo.										
N. Mex.										
Ariz.										
Utah										
Nev.										
Nash.										
Oreg.										
Calif.										
West.										
U. S.		294.7	257.5	250.7	235.3	1,008	1,054	1,072	267.8	249.9

Table 3 Revised

State	Thousand Acres						Percent 1944 Goal is of			
	1937-41		1942		1943	1944	1944		1944	
	: 1937-41 :		: 1942 :		: 1943 :	: 1944 :	: 1944 :		: 1944 :	
	: 1937-41 :		: 1942 :		: 1943 :	: 1944 :	: 1944 :		: 1944 :	
	1	2	3	4	5	6	7	8	9	10
Maine										
N. H.										
Vt.										
Mass.										
R. I.										
Conn.										
N. Y.										
N. J.										
Pa.										
N. E.										
Ohio										
Ind.										
Ill.										
Mich.										
Wis.										
Minn.										
Iowa										
Mo.										
S. Dak.										
Nebr.										
N. Cent.										
Del.										
Md.										
Va.		87.4	82.0	87.5	87.0	87.0	95.7	110.0	116.7	110.0
W. Va.										
N. C.		621.5	539.0	574.0	576.0	576.0	633.6	110.0	117.6	110.0
Ky.										
Tenn.										
E. Cent.		718.9	621.0	661.3	663.0	663.0	729.3	110.0	117.4	110.0
S. C.		104.8	90.0	95.8	90.0	88.0	99.0	112.5	110.0	110.0
Ga.		84.1	68.5	73.0	72.0	72.0	79.2	110.0	115.6	110.0
Fla.		17.3	13.0	13.8	13.8	15.2	15.0	98.7	115.4	110.0
Ala.		.3	.2	.2	.2	-	.2	-	100.0	110.0
Miss.										
Ark.										
La.										
Okla.										
Tex.										
South.		206.5	171.7	182.8	175.8	175.2	193.4	110.4	112.6	110.0
N. Dak.										
Kans.										
Mont.										
Idaho										
Wyo.										
Colo.										
N. Mex.										
Ariz.										
Utah										
Rev.										
Wash.										
Oreg.										
Calif.										
West.										
U. S.		925.4	792.7	844.2	833.8	838.2	922.7	110.1	116.4	110.0

Hurley Tobacco

Table 3 Revised Continued

State	Thousand Acres					Percent 1944 Goal is of				
	1937-41	1942	1943	1943	1944	1944	1942	1943	1943	1943
			Goal	Ind.	Prod.	Prod.	Cap.	Cap.	Ind.	Ind.
	2	3	4	5	6	7	8	9	10	10
Maine										
N. H.										
Vt.										
Mass.										
R. I.										
Conn.										
N. Y.										
N. J.										
Pa.										
N. E.										
Ohio	13.6	12.1	14.2	14.0	14.0	16.4	110.0	127.5	110.0	110.0
Ind.	10.6	8.4	9.8	10.1	8.6	11.1	129.1	132.1	110.0	110.0
Ill.										
Mich.										
Wis.										
Minn.										
Iowa										
Mo.	6.0	6.1	6.0	6.8	6.0	6.2	103.3	121.6	110.0	110.0
S. Dak.										
Nebr.										
N. Cent.	30.2	25.8	30.0	29.7	28.6	32.7	114.3	127.7	110.0	110.0
Del.										
Md.										
Va.	10.8	8.8	10.3	10.5	10.0	11.6	116.0	131.8	110.0	110.0
W. Va.	3.3	2.4	2.8	2.8	3.0	3.1	103.3	129.2	110.0	110.0
N. C.	7.7	6.6	7.7	7.7	7.9	8.5	107.8	128.8	110.0	110.0
Ky.	279.0	251.0	293.7	289.0	292.0	317.9	108.9	126.7	110.0	110.0
Tenn.	63.7	58.0	65.5	65.0	62.0	71.5	116.3	127.7	110.0	110.0
E. Cent.	384.6	324.8	380.0	375.0	374.9	412.6	110.1	127.0	110.0	110.0
S. C.										
Ge.										
Fla.										
Ala.	.2	.1	.1	.1	.1	.1	100.0	100.0	110.0	110.0
Miss.										
Ark.										
La.										
Okla.										
Tex.										
South.	.2	.1	.1	.1	.1	.1	100.0	100.0	110.0	110.0
N. Dak.										
Kans.	.4	.2	.2	.2	.2	.2	100.0	100.0	110.0	110.0
Mont.										
Idaho										
Wyo.										
Colo.										
N. Mex.										
Ariz.										
Utah										
Nev.										
Wash.										
Oreg.										
Calif.										
West.	.4	.2	.2	.2	.2	.2	100.0	100.0	110.0	110.0
U. S.	395.3	350.7	410.5	405.0	403.8	445.6	110.4	127.1	110.0	110.0

TOBACCO OTHER THAN FLUE-CURED AND BURLEY

Table 3 Revised Continued

State	Thousand Acres					Percent 1944 Goal is of:				
	1937-41	1942	1943	1943	1944	1944	1944	1942	1943	
			Goal	Ind.	Prod.	Goal	Prod.		Ind.	
	1	2	3	4	5	6	7	8	9	10
Del.										
N. H.										
Vt.										
Mass.		6.0	5.5	5.7	6.2	4.9	5.8	118.4	105.6	111.5
R. I.										
Conn.		16.8	14.8	16.0	14.1	18.0	16.8	121.6	106.8	112.1
N. Y.		1.0	1.0	1.0	.6	.8	.8	138.3	80.0	133.3
N. J.										
Pa.		30.9	34.3	34.3	32.5	30.0	34.3	114.8	100.0	106.2
N. E.		64.7	66.6	67.0	62.2	48.5	66.7	116.9	102.0	108.6
Ohio		14.8	9.8	9.8	7.3	6.0	9.2	168.3	93.9	126.0
Ind.		.4	.2	.2	.2	.2	.2	100.0	100.0	110.0
Ill.										
Mich.										
Wis.		22.7	19.2	19.2	16.2	20.0	19.8	98.0	102.1	107.7
Minn.		.6	.6	.6	.6	-	.6	-	100.0	100.0
Iowa										
Mo.										
S. Dak.										
Nebr.										
N. Cent.		38.5	29.8	29.8	26.8	26.2	29.6	113.0	99.3	112.5
Del.										
Md.		38.2	39.6	42.9	35.6	37.0	39.0	105.4	98.7	110.0
Va.		24.1	16.3	17.3	16.7	17.0	18.4	108.2	112.9	110.0
W. Va.										
N. C.										
Ky.		79.8	67.7	61.4	59.4	69.4	63.3	109.9	113.2	110.0
Tenn.		62.8	32.1	34.2	33.7	32.4	37.1	114.5	115.6	110.0
E. Cent.		194.9	146.6	166.6	146.3	146.8	159.8	109.6	109.8	110.0
S. C.										
Ga.		.9	.9	.8	.7	.7	.8	114.3	88.9	110.0
Fla.		3.5	3.4	2.9	2.7	2.7	3.0	111.1	88.2	110.0
Ala.										
Miss.										
Ark.										
La.										
Okla.										
Tex.										
South.		4.2	4.3	3.7	3.4	3.4	3.8	111.8	88.4	110.0
N. Dak.										
Kans.										
Mont.										
Idaho										
Wyo.										
Colo.										
N. Mex.										
Ariz.										
Utah										
Nev.										
Wash.										
Oreg.										
Calif.										
West.										
U. S.		292.5	285.8	246.3	227.2	223.1	249.9	113.0	106.2	110.0

Flue-cured Tobacco: Acreage, Maximum Wartime Capacity with Comparisons

Table 4

State and Division	Wartime Capacity					Percentage	
	1942	1943	1944	Maximum		1944	Maximum
	(THOUSAND	ACRES)				of	of
1	2	3	4	5		6	7
Maine							
N. H.							
Vt.							
Mass.							
R. I.							
Conn.							
N. Y.							
N. J.							
Pa.							
N. E.							
Ohio							
Ind.							
Ill.							
Mich.							
Wis.							
Minn.							
Iowa							
Mo.							
S. Dak.							
Nebr.							
N. Cent.							
Del.							
Md.							
Va.	82.0	87.0	87.0	87.0		106.1	106.1
W. Va.							
N. C.	539.0	576.0	576.0	576.0		106.9	106.9
Ky.							
Tenn.							
E. Cen.	621.0	663.0	663.0	663.0		106.8	106.8
S. C.	90.0	90.0	88.0	86.3		97.8	95.9
Ga.	68.6	72.0	72.0	69.0		105.1	100.7
Fla.	13.0	13.6	15.2	15.2		116.9	116.9
Ala.	.2	.2					
Miss.							
Ark.							
La.							
Okla.							
Tex.							
South.	171.7	175.8	175.2	170.5		102.0	99.3
N. Dak.							
Kans.							
Mont.							
Idaho							
Wyo.							
Colo.							
N. Mex.							
Ariz.							
Utah							
Nev.							
Wash.							
Oreg.							
Calif.							
West.							
U. S.	792.7	838.9	838.2	833.5		105.7	105.1

Table 4 Continued

State and Division	Acreage				Wartime Capacity		Percentage		
	1942	1943	1944	Maximum	1944	Maximum	1942	Maximum	
	(THOUSAND)	(THOUSAND)	(THOUSAND)	(THOUSAND)	(THOUSAND)	(THOUSAND)	of 1942	of 1942	
1	2	3	4	5	6	7	8	9	
Maine									
N. H.									
Vt.									
Mass.	5.6	5.2	4.9	3.5		99.1		63.6	
R. I.									
Conn.	14.8	14.1	13.0	11.0		87.8		74.3	
N. Y.	1.0	.6	.6	.6		60.0		60.0	
N. J.									
Pa.	34.3	32.3	30.0	20.0		87.5		58.3	
N. E.	65.6	62.2	48.5	35.1		67.2		63.1	
Ohio	9.8	7.5	6.0	6.0		61.2		61.2	
Ind.	.2	.2	.2	.2		100.0		100.0	
Ill.									
Mich.									
Wis.	19.2	18.2	20.0	20.0		104.2		104.2	
Minn.	.6	.6							
Iowa									
Mo.									
S. Dak.									
Nebr.									
N. Cent.	29.8	26.3	26.2	26.2		87.9		87.9	
Del.									
Md.	39.5	36.6	37.0	27.0		93.7		93.7	
Va.	16.3	16.7	17.0	17.0		104.3		104.3	
W. Va.									
N. C.									
Ky.	57.7	59.4	59.4	59.4		102.9		102.9	
Tenn.	32.1	33.7	32.4	32.3		100.9		100.6	
E. Cen.	145.6	145.3	145.8	145.7		100.1		100.2	
S. C.									
Ga.	.9	.7	.7	.7		77.8		77.8	
Fla.	3.4	2.7	2.7	2.7		79.4		79.4	
Ala.									
Miss.									
Ark.									
La.	.2	.2	.2	.2		100.0		100.0	
Okla.									
Tex.									
South.	4.6	3.6	3.6	3.6		80.0		80.0	
N. Dak.									
Kans.									
Mont.									
Idaho									
Wyo.									
Colo.									
N. Mex.									
Ariz.									
Utah									
Nev.									
Wash.									
Oreg.									
Calif.									
West.									
U. S.	235.5	227.4	224.1	210.3		95.2		69.4	

Table 5

Price Data for 1944 Production Goals
Returns from TOBACCO

		Flue-cured	Burley
A. Historical and Present Prices Per Unit (lb.)			
(1) January 1935 - December 1939 average		\$.205	.222
(2) 1941 average		.281	.292
(3) 1942 average		.304	.418
(4) July 1943 average			
B. Price Ceiling Provisions			
(1) Parity or comparable Price July 1943		\$.309	.300
(2) Highest price January 1 - September 15, 1942		---	---
(3) Price ceiling July 1943		\$.400	.390 1/2
C. Price Support Provisions			
(1) Present support Price		\$.278	.270
(2) Present additional inducements		\$.004	.004
(3) Total Gross returns		\$ ---	---
(4) 90 percent of parity		\$.278	.270
D. Factors Affecting the 1944 Price Needed to Obtain Goal			
(1) 1942 Season Average Price of Commodity	Base 1934-.38	168	188
(2) 1942 Season Average Price of Commodity	Base 1935-.39	187	168
(3) July 1943 Index Commodities Used in Production	Base 1934-.38	---	---
(4) July 1943 Index Commodities Used in Production	Base 1935-.39	129	129
(5) July 1943 Index of Farm Wages	Base 1935-.39	225	225
(6) Unit returns to equal return from competing crops			
E. Suggested 1944 Price			
(1) Suggested average price to farmers		\$ ---	---
(2) Suggested inducements (average value per unit)		\$ ---	---
(3) Total suggested return per unit		\$ ---	---

* Seasonally adjusted

1/ Ceilings were established on the 1942 burley crop which were expected to average approx. .38 per lb. for a crop of average quality. The 1942 crop was above average quality and the 1942 average price was 41.8 cents per lb.

Price Data for 1944 Production Goals

Returns from TOBACCO

	Maryland	Fire-cured	Dark Air-cured	Cigar Filler	Cigar Binder	Cigar Wrapper Comm.	Cigar Wrapper Ge.-File.
\$.204	.102	.093	.109	.134	.794	.695	
\$.301	.141	.120	.124	.169	1.190	.750	
\$.550	.171	.151	.132	.203	1.300	.970	
\$.590	---	---	---	---	---	---	---

\$.243	.144	.119	.149	.213	1.029	.639	
---	---	---	---	---	---	---	---
---	---	---	---	---	1.310	.27	1.230

\$.219	.130	.107	.134	.192	---	---	---
\$.000	.012	.007	.006	.013	---	---	---
---	---	---	---	---	---	---	---
\$.219	.130	.107	.134	.192	.926	.273	

258 1/	126	139	94	101	134	161	
289 2/	168	162	121	151	164	140	
110	110	110	110	110	110	110	
129	129	129	129	129	129	129	
225	225	225	225	225	225	225	

\$							
\$							
\$							

A. Historical and Present Prices Per Unit (lb.)

- (1) January 1935 - December 1939 average
- (2) 1941 average
- (3) 1942 average
- (4) July 1943 average

B. Price Ceiling Provisions

- (1) Parity or comparable Price July 1943
- (2) Highest price January 1 - September 15, 1942
- (3) Price ceiling July 1943

C. Price Support Provisions

- (1) Present support price
- (2) Present additional inducements
- (3) Total gross returns
- (4) 90 percent of parity

D. Factors Affecting the 1944 Price Needed to Obtain Goal

- (1) 1942 Season average Price of Commodity
Base 1919-28
- (2) 1942 Season average Price of Commodity
Base 1935-39
- (3) July 1943 Index Commodities Used in Production
Base 1919-29
- (4) July 1943 Index Commodities Used in Production
Base 1935-39
- (5) July 1943 Index of Farm Wages
Base 1935-39
- (6) Unit returns to equal return from competing crops

E. Suggested 1944 Price

- (1) Suggested average price to farmers
- (2) Suggested inducements (average value per unit)
- (3) Total suggested return per unit

* Seasonally adjusted

- 1/ July 1943 Index Price of Commodity, Base 1919-28
- 2/ July 1943 Index Price of Commodity, Base 1935-39
- 3/ Estimated farm price on green weight basis from ceiling on packed tobacco.

VICTORY GARDENS

The success of the 1943 Victory Garden Program is quite phenomenal. Although 1943 goals were set at 6,000,000 farm gardens and 12,000,000 urban and suburban gardens, the Gallup Poll released June 11, indicated that on that date 19,800,000 gardens had been planted while some 2,000,000 gardens were still to be planted. It was estimated that the 1943 victory gardens should produce some 10-12 million tons of food. 1/ This same poll forecast that 4,400,000,000 jars of fruits and vegetables would be put up this year by homemakers. These estimates may be somewhat optimistic, but victory gardening and home food preservation are making a large and valuable contribution to our total food supply.

Because of this and because the need for food, particularly the health protecting vegetables, probably will be greater than ever in 1944, it is suggested that the goal for 1944 be set at 22,000,000 gardens, with every farm and every rural residence, wherever climate and water supplies permit, having a garden. These goals were arrived at by the Department's Garden Committee, which met with representatives of the Office of Civilian Defense, the Office of Price Administration, and the Office of Education on August 5. In attendance were:

H. W. Hochbaum, Extension Service
M. A. McCall, Bureau of Plant Industry, Soils and Agr. Engineering
W. H. Gaumnitz, Office of Education
John I. Kress, Fruit and Vegetable Branch, Food Distribution Administration
Margaret Dreisback, Farm Security Administration
Henry C. Sherman, Bureau of Human Nutrition and Home Economics
Florence Reynolds, Office of Price Administration
Molly Flynn, Office of Civilian Defense
Thelma Dreis, Food Distribution Administration
Glynn Thrower, Agricultural Adjustment Agency
W. H. White, Bureau of Entomology and Plant Quarantine
Roy Magruder, Food Distribution Administration and Bureau of Plant Industry, Soils and Agricultural Engineering
Victor R. Boswell, Bureau of Plant Industry, Soils and Agr. Engineering
E. G. Moore, Office of Information

The committee also recommended that emphasis should be placed on better and more productive gardens. While every garden counts, small or large, in many areas effort should be made to increase the size of the gardens to the point where they can produce the major supply of vegetables needed by the family. Thus the average sized garden in cities of less than 100,000 is about 3,800 square feet while gardens in larger cities run only to about 500 square feet. Farm gardens average about one-half acre. Therefore, for people living in larger cities, community gardens located on vacant property should be increased wherever possible. Then city people can get a garden space 30 x 50 or larger. In one such garden area in Milwaukee, the plots average 1/10 acre in size. All leaders in victory gardens in our cities might well begin now to acquire the use of vacant property and to prepare this for next year's use.

Potatoes and green peas were planted in many small garden plots this year. This should be discouraged where people do not have a plot of 1/4 acre or more. But on farms and many non-farm rural homesteads, it is suggested that the family produce its supply of potatoes, sweet potatoes, dry beans, black eyed peas, and cane or sorghum for syrup. Edible varieties of soybeans, likewise, should be grown for fresh and dried use.

Continued stress should be placed on growing green and leafy vegetables, yellow vegetables and tomatoes in sufficient supply to meet a family's needs in fresh and preserved form. From a longer time standpoint, encouragement should be given to planting rhubarb, asparagus, small fruits, and some tree fruits on many more of our farms and on non-farm rural and suburban homesteads.

It was suggested that through Department and State College information channels, and with the active cooperation of retailers with the Food Distribution Administration, everything should be done that will encourage people to buy and preserve or store certain vegetables and fruits when market surpluses occur. These steps will prevent losses of certain foods and winter supplies will be increased.

There are some circumstances which make for better gardening conditions next year. Victory gardeners will have available fertilizers with a higher nitrogen content and perhaps better balanced than the victory garden fertilizer of 1943. So far as home gardening projects are concerned, it seems also that there will

1/ Preliminary BAE estimates indicate a total production of 7,940,000 tons from farm and non-farm gardens in 1943.

2-Victory Gardens

be no shortage of seed, that the entire seed situation is better than last year. Something will have to be done to increase the supply of small garden tools, hand cultivators and hand sprayers and dusters, particularly the latter. Those made of plastic, wood or paper did not hold up in 1943. The insecticide situation is about the same as for 1943, although there may be a further shortage of pyrethrum.

In setting State and county garden goals, it is suggested that State garden conferences be arranged this fall. At these conferences State and regional representatives of the Federal agricultural and protective agencies and State representatives of the Extension Service should meet with representatives of private trades and other educational agencies to clear objectives, agree on a program, and set goals for farm and town gardens, as well as to make plans for cooperative work in attaining these goals.

* * *

The Wheat Goal for 1944-45

Wheat requirements for the year beginning July 1, 1944, are projected as follows, in million bushels: Food 564 (civilian 510, military 54), non-food 306 (feed 125, seed 81, and alcohol 100), and exports and shipments 55 (war relief 25, lend-lease 21, regular exports 5, and shipments to territories 4), making total disappearance 925. Assuming a carry-over on July 1, 1944, of 250 million bushels, imports from Canada of 50 million bushels, and a carry-out on June 30, 1945, of 225 million bushels, a crop of about 850 million bushels would be required. With expected yields of 12.5 bushels per seeded acre, this requirement could be produced on 68 million acres, the goal which was announced on July 13.

The Rye Goal for 1944-45

Rye requirements for the year beginning July 1, 1944, are projected as follows, in million bushels: Food 11, non-food 23 (feed 12, seed 8, and alcohol 3), and net exports none (3 imports balancing 3 exports), making total disappearance of 34. Assuming a carry-out on June 30, 1945, of 3 million bushels - 2 million less than on July 1, 1944, a production of 32 million bushels is necessary to meet requirements. With expected yields of 11.4 bushels per seeded acre, this requirement could be produced on 2.8 million acres. The goal announced July 13 was for an acreage slightly smaller than the 2.9 million acres seeded for the 1943 crop.

The Rice Goal for 1944-45

Rice requirements for the year beginning August 1, 1944, are projected as follows, in million bushels rough rice equivalent: Food 33.1 (civilian 28.9, and military 4.2), non-food 4.2 (feed 0.6, and seed 3.6), and exports and shipments 31.2 (lend-lease 8.3, regular exports 12.5, and shipments to territories 10.4), making total disappearance of 68.5. If a reserve of 2.7 million bushels is set up increasing the carry-out by this quantity compared with the carry-over August 1, 1944, total requirements would be 71.2 million bushels. With expected yields of about 46.2 bushels per seeded acre, this could be produced on 1,535,000 acres. This acreage would represent practically no change from the acreage seeded for harvest in 1943.

